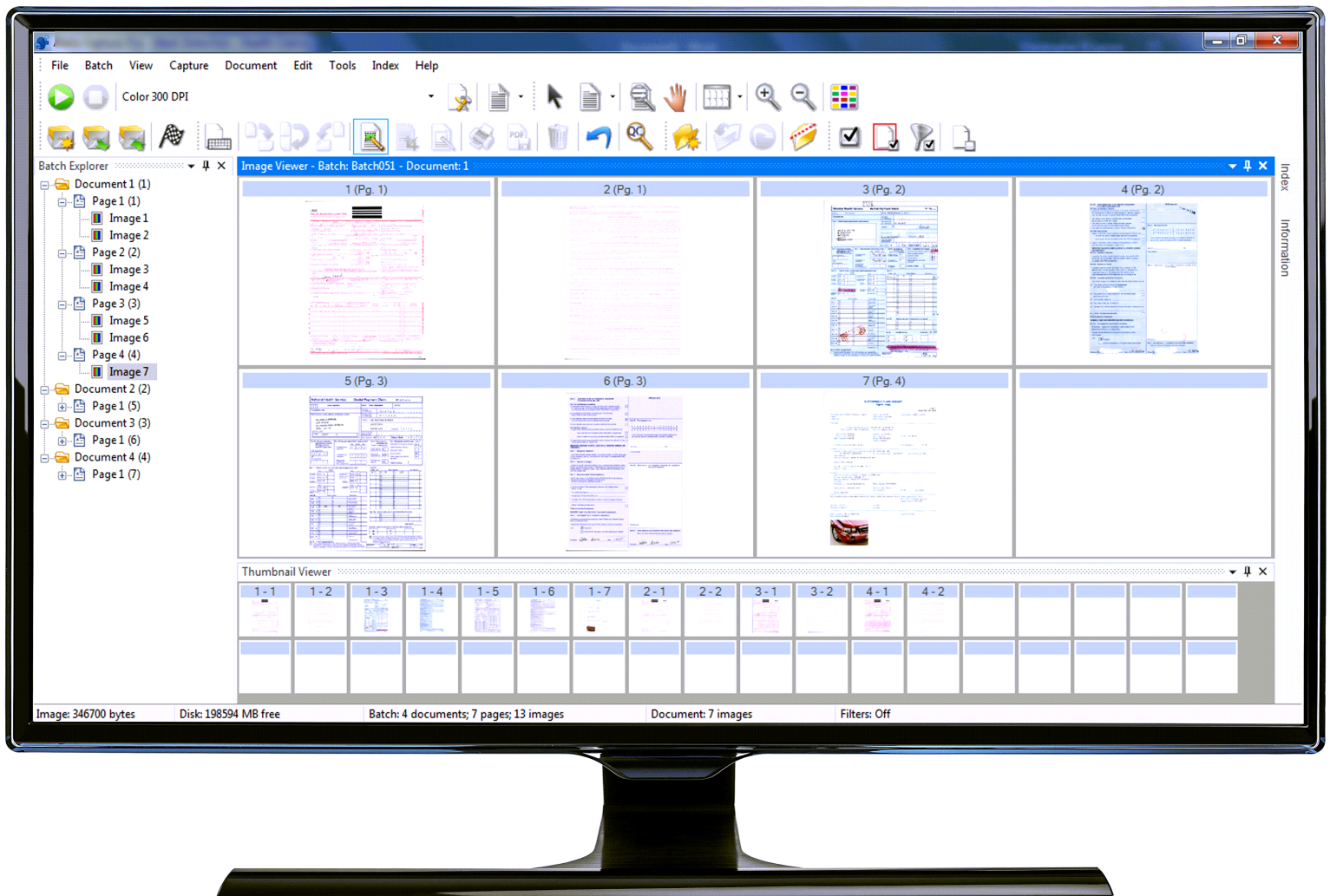


Kodak

Capture Pro Software

Administrator's Guide



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1 Introduction

Capture Pro Software is an easy-to-install, easy-to-use production scanning application for electronic capture of documents.

This software is ideal for imaging, forms processing and workflow applications, and as a standalone application. It manages one- and two-sided scanning, indexing and batching in color, black and white, and/or grayscale. Batches can be easily exported to many popular applications. Capture Pro Software allows you to fully utilize your scanner capabilities for maximum productivity. All functions are performed in the software; no special hardware acceleration is required.

Capture Pro Software is designed for speed, accuracy, and ease-of-use. It enables optimum scanner throughput and maximum productivity. A high-speed multi-page display presents the images and optional index data as documents are scanned. A complete set of icon-based tools is available to simplify scanning management.

This Administrator's Guide provides detailed information about creating job setups which will allow users the most efficient means of using Capture Pro Software. Also includes information about page setups, bar codes and patch codes, auto import and more.

Scanner support

Capture Pro Software supports Kodak and Alaris Scanners, and some third-party scanners are also enabled for use with Capture Pro. A complete list can be found at the link below:
www.kodakalaris.com/go/kcsscannersupport.

For up to date system requirements and certified operating systems see the Specifications page on the Capture Pro web site at:
<https://www.alarisworld.com/solutions/software/document-scanning-software/capture-pro-software#Specifications>.

Supporting documentation

In addition to this Administrator's Guide, the following documentation is also available:

- **On-line Help**—provides product information including detailed product setup, details about the user interface and many advanced features. To locate information in the Help file you can use the table of contents, the index, or the search feature.

To access Help, press **F1**, select the **Help** button on a dialog box or click the ? icon in the top right-hand corner of any window.

- **Getting Started Guide**—provides simple procedures for getting started quickly including installing and launching Capture Pro Software. Procedures are also provided for scanning using the default pre-defined job setups. A PDF for this guide can be found in the Manuals & Guides section of the Capture Pro Software Support page: <https://support.alarisworld.com/capture-pro-software#Manuals>.
- **User's Guide**—provides the basic steps for creating a new batch, scanning documents, editing scanned images and outputting a batch. In addition, a description of windows, menus and tools is also described.

Network Edition: System Guide—provides installation procedures for Capture Pro Network Edition. A PDF of this guide can be found in the Manuals & Guides section of the Capture Pro Software Support web page:

- <https://support.alarisworld.com/capture-pro-software#Manuals>

Release Notes—contain information that may not have been available in other supporting documentation. To view the Release Notes, go to

www.kodakalaris.com/go/kcsdownloads and navigate to the **Workstation/Client Software** section of the website. This section contains a link to the latest Release Notes.

Virus scanning applications

If you are using a virus scanning application, system performance will improve if you exclude Capture Pro Software workgroup, scanned images and batch output folders and subfolders from the virus scanning application access.

The default folder names are:

c:\ScanPro

c:\BatchesPro

c:\Users\Public\Documents\KCS Pro

c:\Program Files (x86)\Kodak\Capture Pro

NOTE: If you modified the default installation folders by selecting the **Advanced** installation option, exclude those folders when configuring your anti-virus software.

Installing the software

Before you begin, refer to the Kodak Alaris website to be sure your PC meets the Recommended Configuration for Capture Pro Software:

<https://www.alarisworld.com/solutions/software/document-scanning-software/capture-pro-software#Specifications>

To complete the installation, you will need:

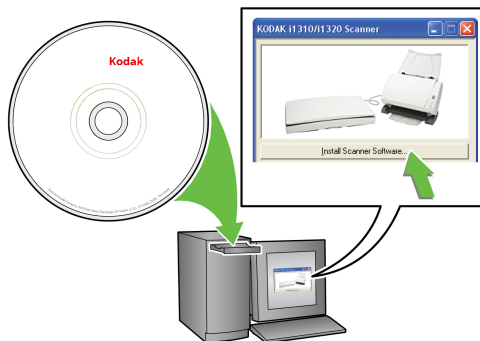
- The scanner driver CD provided by the scanner manufacturer if you will be connecting a scanner.
- The license notification email PDF attachment file that contains your serial number.
- Download the application from the Capture Pro Software website at www.kodakalaris.com/go/CaptureProDownload.

Before installing, check the Release Notes for any additional information.

The Release Notes are available on the *Kodak Alaris* website at www.kodakalaris.com/go/kcsdownloads. Navigate to the **Workstation/Client Software** section of the website. This section contains a link to the latest Release Notes.

Run the EXE installer that was downloaded to start the installation.

- If the computer on which the Capture Pro Software is to be installed does not have internet access, you will also need to download the License Manager tool found on the Capture Pro Software website. The License Manager will be installed on a computer with internet access.
 - Optional hardware key (USB dongle) if purchased.
 - Administrator rights on the PC where you are installing the software.
1. Install the scanner drivers by inserting the scanner driver CD into the CD drive and follow the prompts.



2. Connect the scanner and test the connection using the Scan Validation Tool. See your scanner's User's Guide for more information.

When you install the *Kodak Alaris* Scanner driver, the Scan Validation Tool will automatically be installed. This tool may be used to test that the scanner is connected properly and working.

NOTE: Follow the manufacturer's recommendations for installing and testing the scanner on your PC.

3. Before installing, check the Release Notes for any additional information. The Release Notes are available on the *Kodak Alaris* website at www.kodakalaris.com/go/kcsdownloads. Navigate to the **Workstation/Client Software** section of the website. This section contains a link to the latest Release Notes.

Run the EXE installer that was downloaded to start the installation.

4. When the Installation Menu screen is displayed, select the desired language and click the **Install Capture Pro Software** option.
5. Click **I accept the terms of the license agreement** after you have read the License Agreement and click **Next**. The Hardware License Key screen will be displayed.
6. Select **I will not be using a USB Hardware Key** and click **Next**.

NOTE: If you purchased the optional USB Hardware Key, select **I have inserted my USB Hardware Key** and click **Next**.

The Installation Type screen will be displayed.

7. Click **Next**. The Software Serial Number screen will be displayed.

NOTE: Only check **Install as Capture Pro Network Edition Client** if you purchased Capture Pro Software Network Edition and are installing a client.

8. Enter your software serial number and click **Next**. The Product Registration screen will be displayed.
9. Enter your registration ID as shown in the license notification email you received. If you do not have a registration ID, select **Register Now** and complete registration. Click **Next**. The Get License screen will be displayed while the license is being obtained from the *Kodak Alaris* license server.

NOTE: If your computer does not have internet access, see "Appendix A License Manager" for information on how to obtain a license.

10. At the Setup Type screen, select **Typical** and click **Next**. The Installation Summary screen will be displayed.
11. Click **Next**. The Ready to Install the Program screen will be displayed.
12. Click **Install** to start the installation. Progress screens will be displayed. Follow any prompts.
13. Click **Finish**.
14. If prompted, select the option to restart your computer.

Launching Capture Pro Software

If you are not using the *Index Only* or *Auto Import* editions, be sure your scanner is turned on and is attached properly to the PC. If you purchased an optional hardware key, make sure it is inserted into a USB port on your computer.



- Double-click the Capture Pro Software icon on your desktop, or
 - go to: **Start > Programs > Kodak > Kodak Capture Pro Software.**
-
- Right-click the Capture Pro software icon on your desktop and select **Run as administrator.**

NOTES:

- Network Edition clients will alert you that they are obtaining a license.
- Capture Pro Software Network Edition clients will perform the initial synchronization with the Capture Pro Server Software.

2 Job Setup

The Job Setup function

The Job Setup function allows you to set up the parameters for a job. This chapter provides information and procedures on how to select options on the **Capture**, **Index** and **Output** tabs that allow you to setup a job with criteria that meets your scanning needs. Once a job is setup, you can select a job that meets the scanning and output requirements for a batch of documents.

To setup jobs for use with Capture Pro Software you need to access the Job Setup dialog box. From Job Setup you can select an already-defined Job Name and use it as a template to customize the jobs you need to use in your environment.

There are three predefined jobs that come with Capture Pro Software:

Ready to Scan — allows you to start scanning documents without any setup using default settings. This job does not have any indexes defined and places all scanned images in a folder structure under the C:\ScanPro directory.

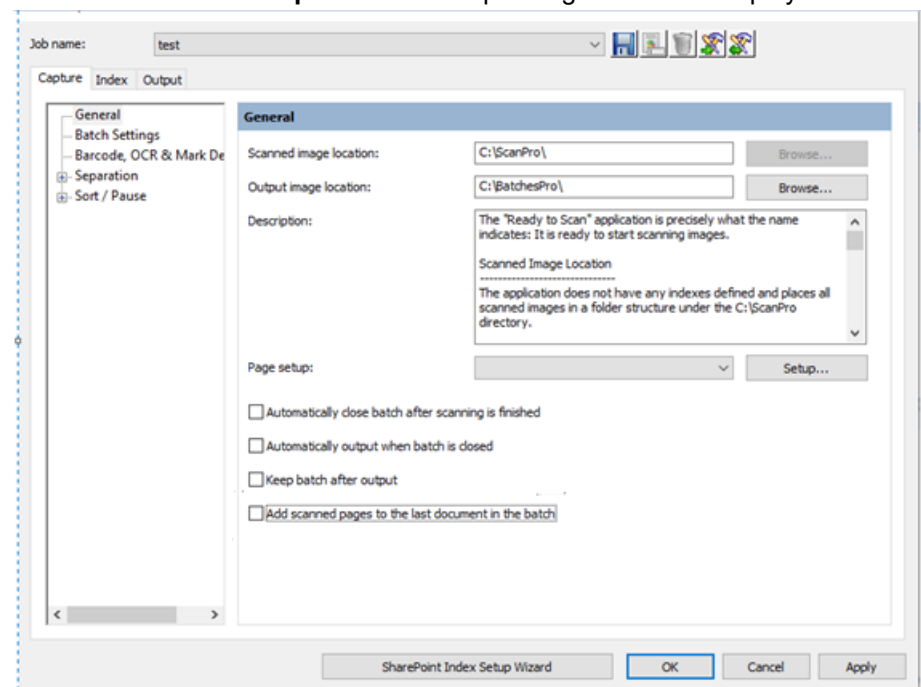
Scan to PDF — similar to Ready to Scan, except when documents are scanned, the first page will be displayed in the Image Viewer and you will be prompted for a filename to be entered as index data. The index data is used as the filename when documents are output.

Scan to e-mail — similar to the Scan to PDF except a PDF file will be created and will be included as an attachment to an e-mail. When the scan is complete, the e-mail software application will be opened with the scanned attachment and be ready to send to an e-mail address from your e-mail account.

Depending on what you want to do, you can select one of these job setups to use as a starting point to setup your job.

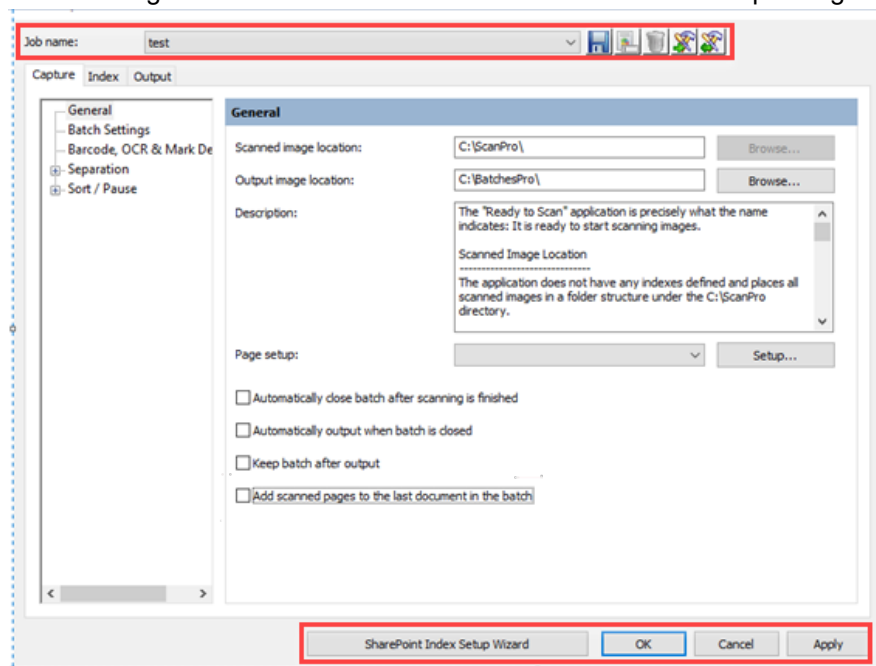
Accessing a job setup

- Click **File > Job Setup**. The Job Setup dialog box will be displayed.



The Job Setup dialog box

The following information is common to all tabs on the Job Setup dialog box:



Job name — lists the predefined jobs and other jobs that have been defined in the drop-down list.

The Job Setup dialog box has three tabs: **Capture**, **Index** and **Output**. Detailed information on how to use these tabs can be found in the following sections.

- The **Index** tab allows you to define index fields at the batch and document levels. The **Database Lookup** tab allows you to specify the data source, define how the lookup is performed and what data is used to populate index fields or validate the contents of index fields. See “Job Setup: Index tab” later in this chapter.
- The **Output** tab allows you to setup Destinations and Advanced options for the job setup. See “Job Setup: Output tab” later in this chapter.

Icons

	Add: allows you to add a new job setup. 1. Click the Add icon. 2. Enter a name for the new job setup and click Save. 3. Using the Capture, Index and Output tabs set up your criteria for this job setup. See the sections that follow for detailed information about each of these tabs. 4. Click OK when finished. NOTE: The last character of the job setup name cannot be a period (.).
	Rename: allows you to rename the currently selected job setup. You cannot rename a job that is open. 1. Select a job setup you want to rename from the <i>Job Name</i> drop-down list. 2. Click the Rename icon. 3. Enter a new name for the job setup and click OK. NOTE: The last character of the job setup name cannot be a period (.).
	Delete: allows you to delete the selected job setup. You cannot delete a job setup if it is open, or until all batches are processed or deleted. 1. Select a job setup you want to delete from the <i>Job Name</i> drop-down list. 2. Click the Delete icon. A confirmation box will be displayed. 3. Click Yes to confirm the deletion.



Export: allows you to export the job setup to a different location while still saving it in Capture Pro Software.

1. Select a job setup from the *Job Name* drop-down list.
2. Click the **Export** icon. The Export dialog box will be displayed.

The screenshot shows the 'Export' dialog box. It contains three main input areas: 'Export location' with a text box and a 'Browse...' button; 'Export name' with a text box containing 'Color VAT Forms'; and 'Export type' with a dropdown menu currently set to 'Directory and Files'. At the bottom right, there are 'OK' and 'Cancel' buttons.

3. Click **Browse** to navigate to the destination folder where you want the job setup exported.
4. The export name will be filled in with the job name that you are exporting. If you want to change that name, enter the new name in the *Export name* field.

NOTE: *Directory and Files* is the only Export type available at this time.

5. Click **OK**. A message will be displayed to notify you that the export was successful.



Import: allows you to import a job setup into Capture Pro Software from another location.

1. Click the **Import** icon. The Import dialog box will be displayed.

The screenshot shows the 'Import' dialog box. It contains three main input areas: 'Import location' with a text box and a 'Browse...' button; 'Import name' with an empty text box; and 'Import type' with a dropdown menu currently set to 'Directory and Files'. At the bottom right, there are 'OK' and 'Cancel' buttons.

2. Click **Browse** to navigate to an exported job setup you want to import.
3. The import name will be filled in with the job name that you are importing. If you want to change that name, enter the new name in the *Import name* field.

NOTE: *Directory and Files* is the only Import type available at this time.

4. Click **OK**. A message will be displayed to notify you that the import was successful.

NOTE: If you are importing a job that uses a different scanner model than the one you are using, any scanner-specific settings (i.e., printer/counter settings) must be reconfigured.

After making all your job setup entries, click:

More Output destinations — this button is only displayed on the Output tab. When clicked, displays less frequently used and third party system output destinations.

SharePoint Index Setup Wizard — provides a quick, easy way of configuring a Capture Pro Software job setup for use with your existing SharePoint site. For more information, see “Using the SharePoint Index Setup wizard” later in this chapter.

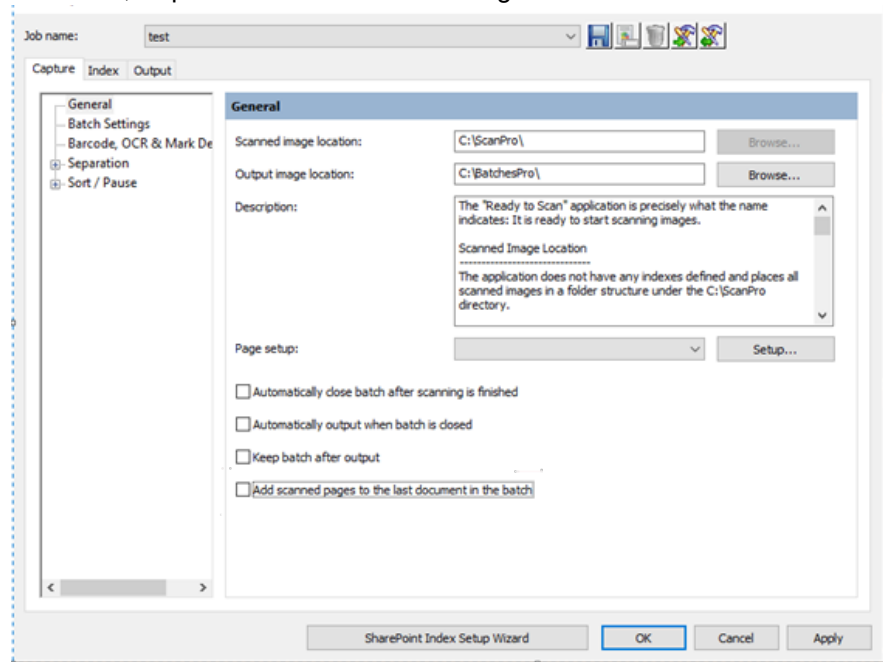
OK — closes the dialog box and saves your entries.

Cancel — closes the dialog box without saving any changes.

Apply — saves your changes, but the dialog box remains open.

Job Setup: Capture tab

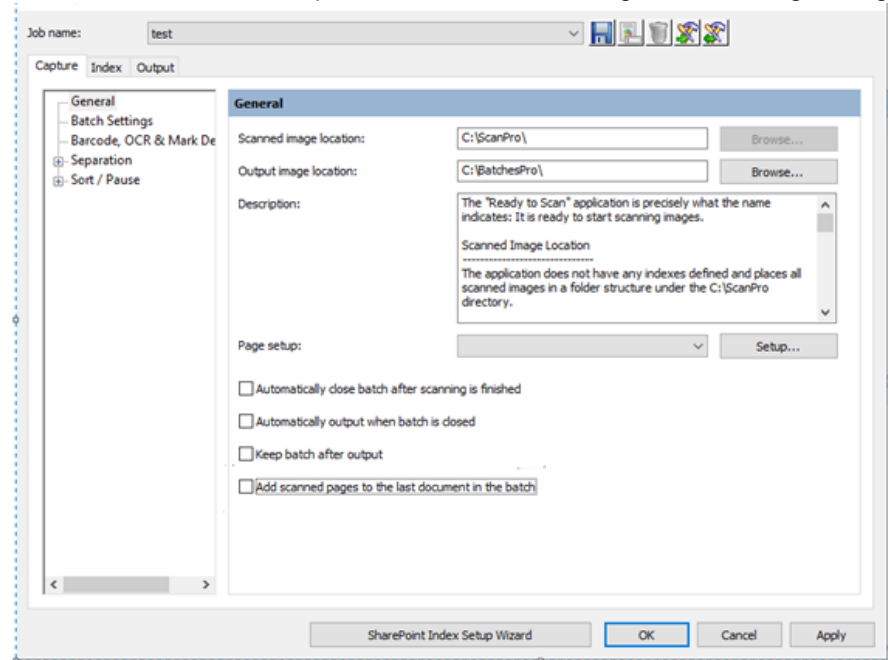
The Capture tab allows you to make General, Batch, Bar Code, OCR & Mark Detection, Separation and Scanner settings.



- **General** — allows you to define the way images will be stored after scanning.
- **Batch Settings** — allows you to define the batch name format for the job setup and put limits on the numbers of batch documents or document pages.
- **Bar Code, OCR & Mark Detection** — allows you to create and modify bar code, OCR and mark detection zones and set them up for use.
- **Separation** — allows you to set up batch and document separations by: count, blank page, bar code zone, OCR zone, or patch code.
- **Scanner** — allows you to create settings for image addressing and printing on scanners with those capabilities. Scanner settings such as image address, printer, and patch settings should always be done in Job Setup and not in Page Setup. Conflicting settings will default to Job Setup settings.
- **Sort** — allows you to identify how you want to sort pages and documents for a job. Sorting can be physical (automatic) sorting on scanner models that support multiple output trays (e.g. *Kodak i5x50S*) or can be manual sorting. Several kinds of sort rules can be added to your job.

General settings — Capture tab

Select **General** on the Capture tab to make or change the following settings:



Scanned image location — displays the current location where scanned images will be stored for the selected job. If you do not want images scanned in the displayed location, click **Browse** to select another location.

Output image location — allows you to select the final destination for your output images. If you do not want the images to go to the displayed location, click **Browse** to select another location.

Description — allows you to enter any important notes as a reminder of the settings for this job setup.

Page setup — sets the selected default page setup when a new batch is opened. The list of page setups available to the user during scanning may also be selected. Select **Setup** to display the Select Page Setup dialog box. Use the **Add Item** and **Remove Item** buttons to build a list of *Selected Page Setups* from the *Available Page Setups* list. When finished, click **OK**.

From the *Page setup* drop-down list, select the default page setup that will be used when a new batch is opened.

- **Automatically close batch after scanning is finished** — if checked, closes the batch in Batch Explorer and the Image Viewer when the scanner transport stops.
- **Automatically output when batch is closed** — if checked, processes the batch to output immediately after the batch is closed.
- **Keep batch after output** — if checked, saves the batch in the scanned image location and also creates the output batch.
- **Add scanned pages to the last document in the batch** — if checked, adds all subsequent pages scanned to the last document in the batch.

Batch settings — Capture tab

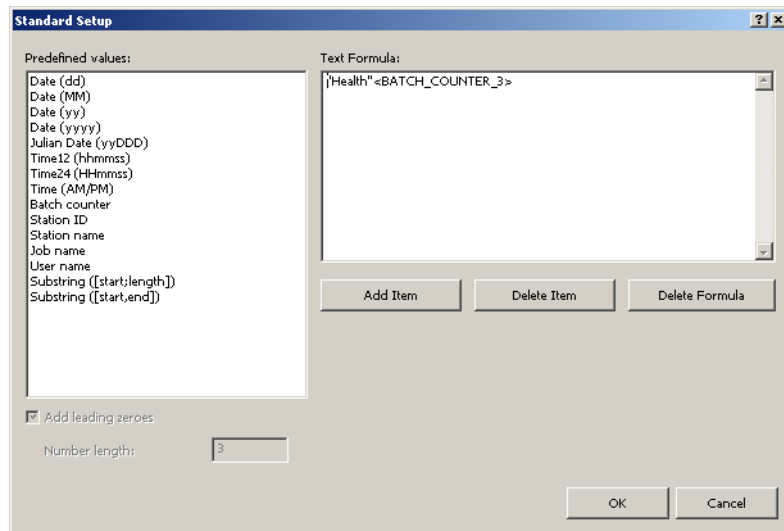
Select **Batch Settings** on the Capture tab to define the batch naming format for this job and set limits on the number of batch documents or document pages. For example, if you know that all of your batches contain 100 documents, setting limits will alert you if your batch does not match the number of documents you are expecting in a batch.

The screenshot shows the 'Job Setup' dialog box with the 'Capture' tab selected. The 'Batch Settings' section is active, showing options for batch naming and limits. The 'Batch naming' section has a 'Batch name' dropdown set to 'Standard' and a 'Next batch number' input field set to '1'. The 'Limits' section has two sub-sections: 'Documents per Batch' and 'Pages per Document'. Each has a 'Numbers' range (1 to 99999999) and a 'Warn' input field set to '0'. The 'Reset document ID' checkbox is checked. The bottom of the dialog has buttons for 'SharePoint Index Setup Wizard', 'OK', 'Cancel', and 'Apply'.

- **Batch naming** — make the following selections:
 - **Batch name** — select a batch name from the drop-down list. The *Standard* batch name is “**BatchXXX**”. If you want to change your batch name to “Invoices” and the date, you would click **Setup** to open the Standard Setup dialog box. From this dialog box, you can make these settings. See “Changing the Batch naming settings” for procedures.
 - **Next batch number** — enter the desired next batch number. The actual batch number is determined at the time the batch is created. You will not be able to enter a value if **Enable Job Level batch numbering** is unchecked. See “Setting up your Workstation” in Chapter 2 of the User’s Guide for *Kodak Capture Pro Software*.
- **Limits - Documents per Batch** — make the following selections:
 - **Numbers**: enter or select the minimum and maximum number of documents that you want to allow in a batch.
 - **Warn**: enter a document number to serve as a warning that the batch is approaching its maximum number of documents. When scanning exceeds this limit (by one or two documents), scanning will stop.
- **Limits - Pages per Document** — make the following settings:
 - **Numbers**: enter or select the minimum and maximum number of pages that you want to allow in a document.
 - **Warn**: enter a page number to serve as a warning that the document is approaching its maximum number of pages. When scanning exceeds this limit (by one or two pages), scanning will stop.
- **Reset document ID**: check this box to reset the document counter to 0.

Changing the Batch naming settings

When you select **Standard** and **Setup** from the *Batch naming* field, the Standard Setup dialog box will be displayed where you can add or delete values to the batch name.



The Predefined values list provides values that you can select to add to the text formula currently in use. You can add any number of items to the batch name by selecting the item you want from the *Predefined values* list.

For example, if you want your batch to be labeled with the User name, date and time, enter the following:

User name, Date (dd), Date (yy), Time24 (HHmmss)

The result would be: **John Smith0409115503**.

To add a value:

1. Select the value you want to add from the *Predefined values* list.
2. Click **Add Item**. The item will be added to the formula.

NOTE: When specifying a path name, the limit is 248 characters.

3. If you want to add more values, repeat Steps 1 and 2.

NOTE: The *Add leading zeroes* and *Number length* fields become available when you select the **Batch counter** value.

4. If applicable, click **Add leading zeroes** to add zeroes the left side of your sequence number.
5. If applicable, enter a value in the *Number length* field to limit the number of predefined values allowed in the text formula.
6. Click **OK** when finished.

NOTES:

- Clicking **Delete Item** will remove the last predefined value from the text formula.
- Clicking **Delete Formula** will remove the text formula.

When you select **Daily Counter Reset** and **Setup** from the *Batch naming* field, the Daily Counter Reset Setup dialog box will be displayed where you can add or delete values to the batch name and select the reset value.

The Predefined values list provides values that you can select to add to the text formula currently in use. You can add any number of items to the batch name by selecting the item you want from the *Predefined values* list. To enable *Daily Counter Reset* you must select the predefined value **Batch Counter**. When **Batch Counter** is selected, the counter will increment for each new batch. When **Reset batch number every day** is selected, the Batch Counter will reset to the value specified by *Reset value* at the start of each day.

NOTES:

- To avoid duplicate batch names, the Text Formula should include at least one value that changes daily. For example, if you want your batch to be labeled with the date and an incrementing number, enter the following:

Date(yyyy), Date(MM), Date(dd), Batch counter

For the first batch of the day the result would be: 20120528001

The second batch will be: 20120528002

The first batch of the following day will be: 20120529001

- When using a Kodak Scanner or Alaris Scanner with an imprinter, the Daily Counter Reset will also reset the scanner counter to a value of **1** at the start of each day.

To add a value:

1. Select the value you want to add from the *Predefined values* list.
2. Click **Add Item**. The item will be added to the formula.

NOTE: When specifying a path name, the limit is 248 characters.

3. If you want to add more values, repeat Steps 1 and 2.

NOTE: The **Add leading zeros** and **Reset batch number every day** become available when you select the **Batch counter** value.

4. If applicable, click **Add leading zeros** to add zeros to the left side of your sequence number.
5. If applicable, enter a value in the *Number length* field to limit the number of predefined values allowed in the text formula.
6. If applicable, click **Reset batch number every day** to have the sequence number reset to a specific value at the start of each day.
7. If applicable, enter a value in the *Reset value* field to specify the starting sequence number to be used at the start of each day.

NOTES:

- Clicking **Delete Item** will remove the last predefined value from the text formula.
- Clicking **Delete Formula** will remove the text formula.

Bar Code, OCR & Mark Detection settings — Capture tab

See “4 Bar Code, OCR and Mark Detection Setup” for information on configuring your bar code, OCR and mark detection settings.

Separation settings — Capture tab

The **Separation** option on the Capture tab allows you to identify how you want to separate batches and documents for a job. There are several ways to add separators to your batches. The following list provides the options you can use to create separation settings in Capture Pro Software:

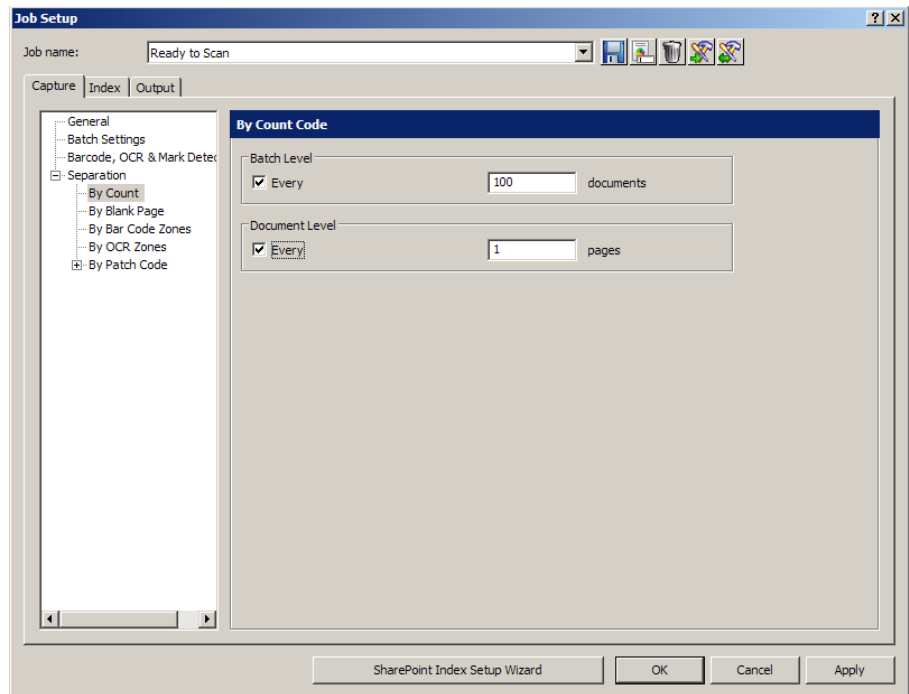
- with a bar code zone (see “4 Bar Code, OCR and Mark Detection Setup”)
- with an OCR zone (see “4 Bar Code, OCR and Mark Detection Setup”)
- with Patch codes 2, 3 or T (see “3 Patch Setup”)
- by automatically counting pages in a document(s) in a batch (set this option up using the **By Count** option)
- with a blank page (set this option up using the **By Blank Page** option)
- by selecting **Document>New** or **Batch>Next**
- by pressing **Enter** during scanning
- by right-clicking on a page file in the Batch Explorer and clicking **Split**

The sections that follow provide information and procedures for using Capture Pro Software to automatically separate documents or batches by counting pages and how to use blank page separation.

By Count

The **By Count** separation setting on the Capture tab allows you to enter the number of documents that each batch will contain, and the number of pages each document will contain.

1. Choose **Batch Level** and/or **Document Level**.

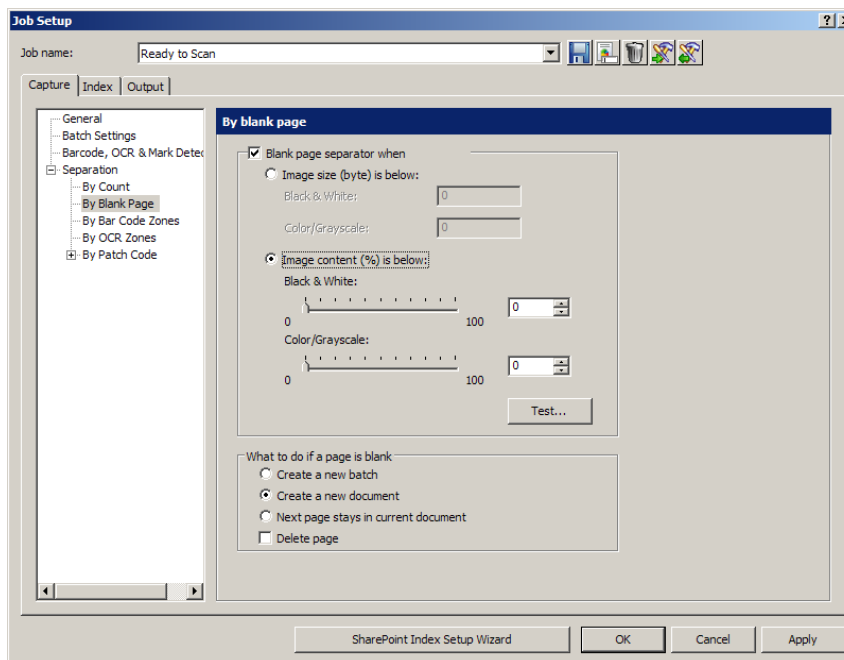


2. Click **Every** at the **Batch Level** and enter the number of documents that the batch must contain before a new batch is created.
3. Click **Every** at the **Document Level** and enter the number of pages that a document must contain before a new document is created.

By Blank page

When scanning images, you can insert blank pages to serve as separators. Capture Pro Software can recognize blank pages and use them to start new batches, start new documents, or create attachments to documents.

To use this method enable the **By Blank Page** option and select the desired settings.



When you are simultaneously scanning black and white and color/grayscale images, Capture Pro Software can use either black and white or the color image to determine a blank page. When the software detects a blank page, all four images (Color front; Color back; Black and White front; and Black and White back) of the page are either deleted or attached to the new/current document, depending on the settings you created.

The size (in bytes) of both the front and back images of a page must fall below the entered byte value for Capture Pro Software to recognize the page as blank. If the software does not recognize a blank page, it will ignore it as a separator.

NOTE: It is recommended that you test these values to ensure that the software will detect your blank pages as a separator. See “Testing your settings” for procedures.

Blank Page Image Separator when — activates blank page separation.

- **Image size (byte) is below** — creates blank page separations based on the size (in bytes) of the blank page image. Specify the maximum amount of data (bytes) an image can contain and still be considered blank for each image type (Black & White, Color/Grayscale) that you will be scanning.

The image size is checked against the raw image coming from the scanner before operations are performed.

- **Black & White:** enter the maximum image size in bytes for black and white. By default, 3000 bytes is suggested for black and white images.
- **Color/Grayscale:** enter the maximum image size in bytes for color or grayscale. The maximum image size that can be specified is 1,000,000 bytes (1 MB) to allow for blank page separation when color scanning. 100,000 bytes is recommended.

- **Image content (%) is below** — creates blank page separations based on the percentage of image content in the blank page image.

NOTE: If the pages you are scanning are different sizes, a small page may fall below your blank image byte count even though it contains data. In this case, you may want to describe a blank image by specifying **% content** rather than byte size.

- **Black & White:** enter the percentage limit for black and white images.
- **Color/Grayscale:** enter the percentage limit for color and grayscale images.

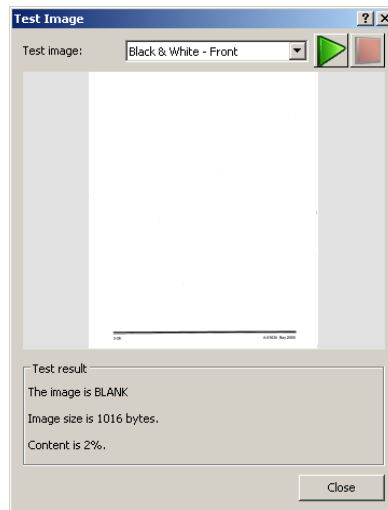
Test — opens the Test Image dialog box, which allows you to scan and test the blank page that is being used as a separator that will be considered blank when compared against the Image content (%) settings. Use this option to verify that the software considers the page to be blank. See “Testing your settings” for more information.

What to do if a page is blank — select one of the options as the next step after the software recognizes a blank page separation.

- **Create a new batch** — creates a new batch when a blank page is detected.
- **Create a new document** — creates a new document when a blank page is detected.
- **Next page stays in current document** — deletes the blank page.
- **Delete page** — when checked, the blank page will not be included in the batch or document that you are separating on.

Testing your settings

1. Place a document in the scanner that is representative of the document you want to test for blank page separation.
2. Click **Test** to display the Test Image dialog box.



3. Click the green **Scan** button. The results will be displayed in the *Test result* box.
 - The image is: indicates if the image is **Blank** or **Not Blank**.
 - Image size is - (bytes): the size of the test image in bytes.
 - Content is - %: the percentage of content in the test image.
4. Evaluate the values displayed in the **Image size is - (bytes)** and/or **Content is - %** test result area and click **Close**.
5. Based on the results, readjust your entered values as needed and click **OK**.

Sort settings — Capture tab

On the **Job Setup** screen, **Capture** tab, the **Sort** option allows you to identify how you want to sort pages or documents for a job setup. Sorting can be physical sorting on scanner models that provide multiple output trays (e.g. *Kodak i5x50S* scanner) or can be manual sorting.

Sorting results in different treatment at scanner output:

- The sorted page or document is diverted to a different tray (for physical sorting).
- The scanner is stopped and instructions are shown to the user for the sorted page/document (for manual sorting).

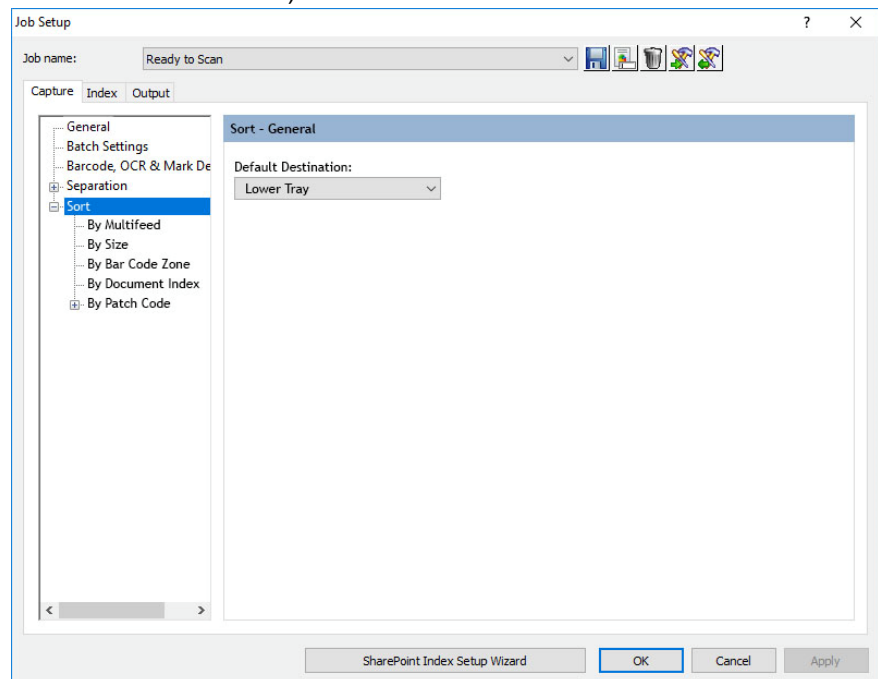
The following list provides options you can use to create sort settings in Capture Pro Software:

1. By multifeed
2. By size
3. By patch code
4. By bar code
5. By document index

If multiple sort options are configured, the sort order will be as listed above. For all sort options excluding document index, the sort is by page. For document index sorting, the entire document will be sorted to the defined bin or instructed manually.

When the scanner supports physical sorting and sorting is configured, the **Default Destination** should be defined on the **Sort – General** page.

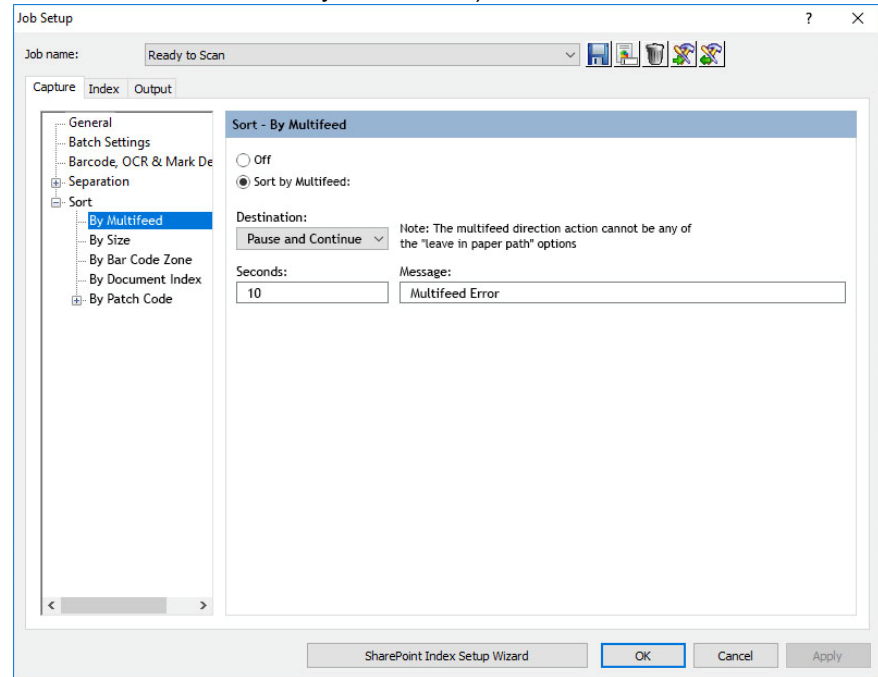
NOTE: The *Paper destination* (the default paper tray) will be enabled only when the scanner model supports physical sorting (e.g. a *Kodak i5x50S* scanner).



The sections that follow provide information and procedures for using Capture Pro to automatically sort pages or documents.

By Multifeed

In the left pane of the **Capture** tab, choose **Sort By Multifeed**. For this sorting option, multifeed detect must be enabled in the scanner driver (see the TWAIN or ISIS documentation for your scanner).



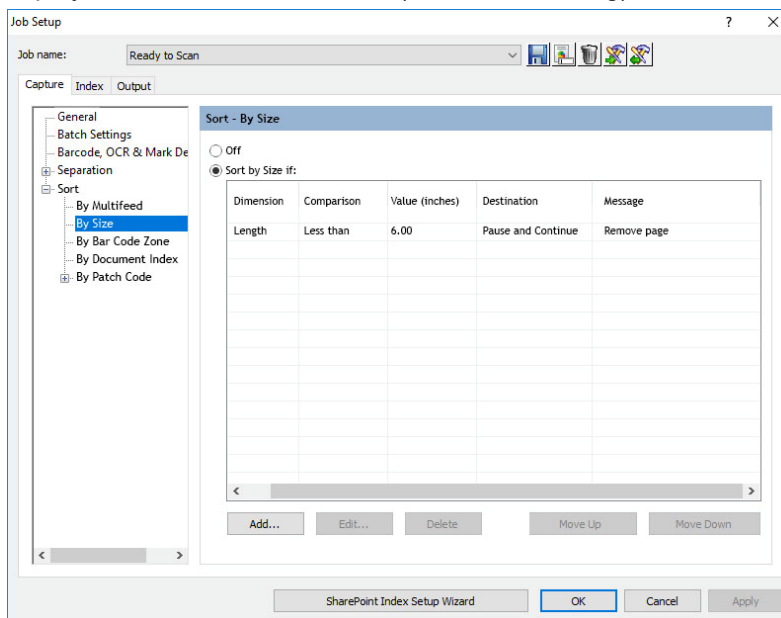
To enable **Sort by Multifeed**, select the **Sort by Multifeed** radio button. If the scanner supports physical sorting (e.g. the *Kodak i5x50S* scanner), then the **Destination** field will list the trays supported by scanner, and the **Message** fields will be hidden. If physical sorting is not supported by your scanner, then the **Destination** drop-down will contain *Pause and Continue* and *Stop*, and the **Message** field will be displayed and enabled. If *Pause and Continue* is selected, then you must define the number of **Seconds** you want scanning to pause for before the scanner restarts.

During Scanning: When Sort by Multifeed is enabled and a multifeed is detected by the scanner:

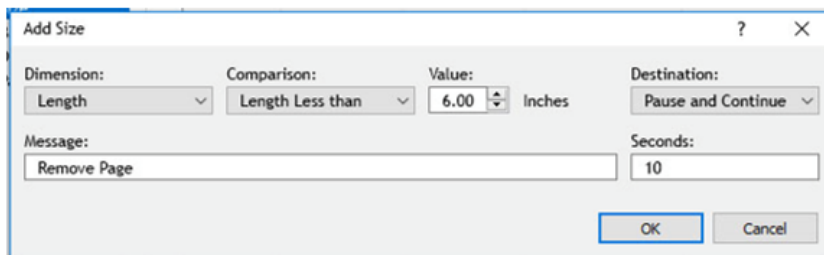
- For scanners that support physical sorting, the page will go to the Destination Tray defined for Physical sorting and scanning will continue.
- For manual sorting and **Destination** is *Pause and Continue*, scanning will stop, the configured message will display for the specified number of seconds and close, then scanning will resume.
- For manual sorting and **Destination** is *Stop*, scanning will stop and the configured message will display. Button options will be *Continue scanning* or *Stop*.

By Size

In the left pane of the **Capture** tab, choose **Sort By Size**. To enable this option, choose the **Sort by Size if** radio button and select **Add** to configure size rules. On this screen, each row of the table shows what size page that rule is applied to and where the page will go (for physical sorting) or the message that will be displayed and the scanner action (for manual sorting).



Add — Display the **Add Size** dialog box to enable definition of a size sorting rule.



- **Dimension:** Choose **Length** or **Width** (if supported). For scanners that support physical sorting (e.g. i5x50S), sort by **Length** is supported.
- **Comparison:** **Less than**, **Greater than**, or **Between**.
- **Value:** Enter the inches/mm value that will cause a page to be sorted.
- **Destination, Message, and Seconds:** If the scanner supports physical sorting (e.g. the *Kodak i5x50S* scanner), then the **Destination** field will list the trays supported by scanner, and the **Message** field will be hidden. If the scanner does not support physical scanning, then the **Destination** drop-down will contain *Pause and Continue* and *Stop*, and the **Message** field will be displayed and enabled. If *Pause and Continue* is selected, then you must define the number of **Seconds** you want scanning to pause before the scanner restarts.
- **OK:** Add rule and close the **Add Size** dialog box.
- **Cancel:** Close the **Add Size** dialog box without adding rule.

NOTE: For scanners that support physical scanning, up to two size sorting rules may be defined.

Edit — Open selected rule for editing in the **Add Size** dialog box.

Delete — Remove the selected rule.

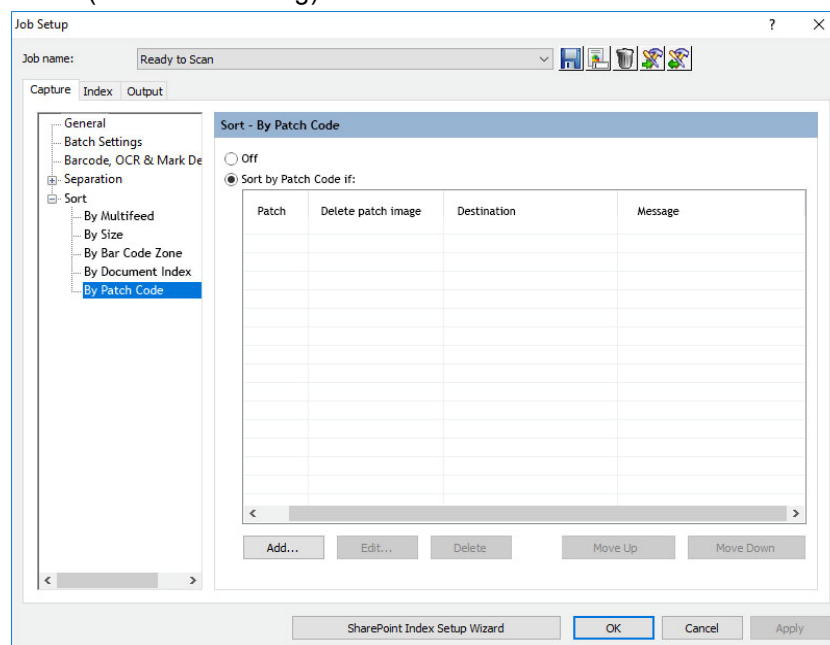
Move Up / Move Down — Move the selected rule up or down in the list. Order may be important: the first rule that is met will be applied.

During Scanning: When *Sort by Size* is enabled and a size rule is met, the action below will be taken. Subsequent pages will be evaluated for sorting rules:

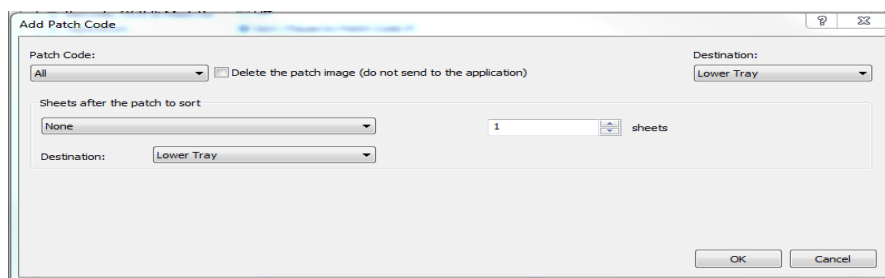
- For scanners that support physical sorting, the page will go to the **Destination** tray defined for physical sorting. Scanning will continue.
- For manual sorting and **Destination** is *Pause and Continue*, scanning will stop, the configured message will display for the specified number of seconds and close, then scanning will resume.
- For manual sorting and **Destination** is *Stop*, scanning will stop and the configured message will display. Button options will be *Continue scanning* or *Stop*.

By Patch Code

In the left pane of the **Capture** tab, choose **Sort By Patch Code**. To enable this option, choose **Sort by Patch Code if**. Select **Add** to configure patch code rules. The sorting rules define how to handle patch code sheets. On this screen, each row of the table shows what patch code that rule is applied to, whether the patch code image is kept, and where the patch code page will go (for physical sorting) or the message that will be displayed and the scanner action (for manual sorting).



Add — Display the Add Patch Code dialog box.



- **Patch Code:** For scanners that support physical sorting, the *Patch Code* pull down contains **All, T, 1, 2, 3, 4 or Toggle, 6, 10, 11, 12, 13, 14, 15**. For scanners without physical sorting, the pull down contains **1, 2, 3, T**.
- **Delete patch image:** Check if the image of the patch code should be deleted.
- **Destination, Message, and Seconds:** If the scanner supports physical sorting (e.g. the *Kodak i5x50S* scanner), then the **Destination** field will list the trays supported by scanner, and the **Message** field will be hidden. For scanners without physical sorting, the **Destination** drop-down will contain *Pause and Continue* and *Stop*, and the **Message** field will be displayed and enabled. If *Pause and Continue* is selected, then you must define the number of **Seconds** you want scanning to pause for before the scanner restarts.
- **Sheets after the patch to sort:** allows you to select which sheets of paper, immediately following the patch sheet, will be sent to the Destination you set up. *This feature will only enable for physical sorting (e.g. Kodak i5x50S).*
 - **(none)**
 - **Specified Number:** allows you to select an exact number of sheets from **1** to **99**.
 - **All Until This Patch:** indicates every sheet of paper is sent to the Destination, up to the next sheet of paper when this rule's patch is detected.

NOTE: Use this option if you have an unknown number of consecutive pages in your document set that you want to sort. In this case, obtain two patch sheets with this patch type, then place one patch sheet before the pages to sort and place the other patch sheet after the pages to sort.

- **All Following:** indicates every sheet of paper after the patch sheet is sent to the destination, until the scanning session ends.

NOTES:

- Sorting that is in progress will continue until finished. So if you have a rule to sort a specific number of sheets, and a second sorting rule is met before that number of sheets has been sorted, the second rule will be ignored.
- Sorting will be terminated by any of the following events: **Stop scanning, Multifeed that stops scanning** or **Jam the stops scanning**.

Destination: the output location to deliver each sheet that this patch sorting rule is applied to.

NOTE: Destination is available only when Sheets After the Patch to Sort is not **(none)**.

OK: Add rule and close **Add Patch Code** dialog box

Cancel: Close **Add Patch Code** dialog box without adding rule.

Edit—Open selected rule for editing in the **Add Patch Code** dialog box.

Delete — Remove the selected rule.

Move Up / Move Down — Move the selected rule up or down in the list. The first rule that is met will be applied.

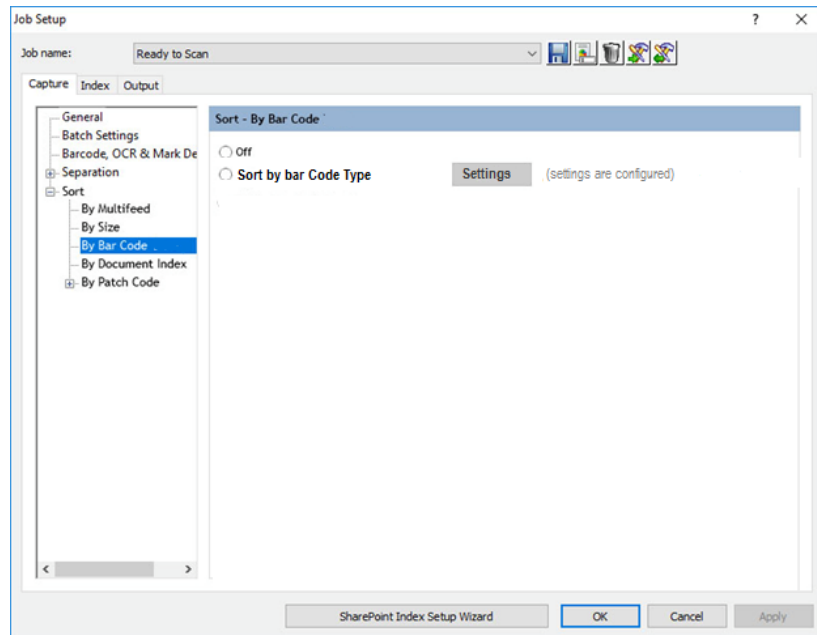
During Scanning: When *Sort by Patch Code* is enabled and a size rule is met, the action below will be taken. Subsequent pages will be evaluated for sorting rules:

- For scanners that support physical sorting, the page will go to the **Destination** tray defined for physical sorting. Scanning will continue.
- For manual sorting and **Destination** is *Pause and Continue*, scanning will stop, the configured message will display for the specified number of seconds and close, then scanning will resume.
- For manual sorting and **Destination** is *Stop*, scanning will stop and the configured message will display. Button options will be *Continue scanning* or *Stop*.

By Bar Code

In the left pane of the **Capture** tab, choose **Sort By Bar Code**. The sorting rules define how to handle pages with bar codes.

If your scanner will do physical sorting (e.g. a *Kodak i5x50S* scanner), you will see the following dialog box.



Choose **Sort by bar code type**. The TWAIN driver UI will display, enabling you to set up bar code sorting rules.

If you add bar code rule(s) and select **OK** in the TWAIN dialog box, then **Sort by bar code type** will remain enabled, and the text next to the **Settings** button will say *(Settings are configured)*. If you do not save a bar code rule in the TWAIN dialog box, then the **Off** radio button will be selected automatically, since nothing was configured. The **Settings** button is enabled only when one or more bar code sorting rules have been saved. Use the **Settings** button to re-enter the TWAIN driver bar code sort tab.

Bar code sorting that you set up in the TWAIN UI will be stored in the Job Setup definition for your scanner type.

If your scanner will not do physical sorting, the following dialog box will let you set up bar code sorting rules:

[illegible]

Choose **Sort by Bar Code Zone** if to set up manual sorting rules based on one or more predefined bar code zones. Select **Add** to configure bar code sorting rules. The rules are saved in the Job Setup definition for non-sorting scanners. On this dialog box, each row of the table shows which bar code zone the rule is applied to, the sorting condition, and the message that will be displayed.

Add — Open the **Add bar code zone** dialog box.

The screenshot shows a dialog box titled "Add Bar code zone". It contains several input fields and buttons. The "Bar code zone:" field is set to "Zone 1". The "Comparison:" field is set to "Length less than". The "Value:" field is set to "4". The "Destination:" field is set to "Pause and Continue". The "Message:" field contains the text "Remove Page". The "Seconds:" field is set to "10". There are "OK" and "Cancel" buttons at the bottom right.

- **Bar code zone:** List of bar code zones defined in Bar Code setup.
- **Comparison:** Choose an option from the list. Options for the next field, **Value**, will change based on the **Comparison** option chosen:

Comparison Selection	Value Entry
Value between Length between	Controls to enter min and max values or lengths
Value contains Value does not contain Value starting with Value ending with	Text box
Length equal to Length not equal to Length less than Length greater than Value equal to Value not equal to Value less than Value greater than	Control for one length or value

- **Destination:** *Pause and Continue* or *Stop*.
- **Message:** Enter a message to display to the scanner operator (e.g. "Remove bar code page.")
- **Seconds:** If the **Destination** is *Pause and Continue*, then you must define the number of **Seconds** you want scanning to pause before the scanner restarts.
- **OK:** Add rule and close **Add bar code zone** dialog box.
- **Cancel:** Close **Add bar code zone** dialog box without adding rule.

Edit — Open selected rule for editing in the **Add bar code zone** dialog box.

Delete — Remove the selected rule.

Move Up / Move Down — Move the selected rule up or down in the list. The first rule that is met will be applied.

During Scanning: When Sort by Bar Code is enabled and a bar code rule is met, the action below will be taken. Subsequent pages will be evaluated for sorting rules:

- For scanners that support physical sorting, the page will go to the **Destination** tray defined for physical sorting. Scanning will continue.
- For manual sorting and **Destination** is *Pause and Continue*, scanning will stop, the configured message will display for the specified number of seconds and close, then scanning will resume.
- For manual sorting and **Destination** is *Stop*, scanning will stop and the configured message will display. Button options will be *Continue scanning* or *Stop*.

By Document Index

In the left pane of the **Capture** tab, choose **Sort By Document Index**. Select **Add** to configure document index rules. On this screen, each row of the table shows which index that rule is applied to, the comparison to be made, the value to be used for the comparison, and where the document will go (for physical sorting) or the message that will be displayed and the scanner action (for manual sorting).

[illegible]

Add — Show the **Add Document Index** dialog box.

Add Document Index ? X

Index: Zone 1 Comparison: Equal to Value: 1 Destination: Pause and Continue

Message: Paused Index 1 Seconds: 10

OK Cancel

- **Index:** List of defined document index fields.

- **Comparison:** Choose an option from the list. Options for the next field, **Value**, will change based on the **Comparison** option chosen:

Comparison Selection	Value Entry
Is Empty Has Value	Value field does not appear
Is Between	Enter high and low values
Equal To Not Equal To Is Less Than Is Greater Than Contains	Enter one value

- **Destination, Message, and Seconds:** If the scanner supports physical sorting (e.g. the *Kodak i5x50S* scanner), then the **Destination** field will list the trays supported by scanner, and the **Message** field will be hidden. For scanners without physical sorting, the **Destination** drop-down will contain *Pause and Continue* and *Stop*, and the **Message** field will be displayed and enabled. If *Pause and Continue* is selected, then you must define the number of **Seconds** you want scanning to pause before the scanner restarts.
- **OK:** Add rule and close **Add Document Index** dialog box.
- **Cancel:** Close **Add Document Index** dialog box without adding rule.

Edit — Open selected rule for editing in the Add Document Index dialog box.

Delete — Remove the selected rule.

Move Up / Move Down — Move the selected rule up or down in the list. The first rule that is met will be applied.

During Scanning: When Sort by Document Index is enabled and a document index rule is met:

- For scanners that support physical sorting, the page with the document index will go to the **Destination** tray defined for physical sorting. Scanning will continue.
- For manual sorting and **Destination** is *Pause and Continue*, scanning will stop, the configured message will display for the specified number of seconds and close, then the next page will be scanned.
- For manual sorting and **Destination** is *Stop*, scanning will stop and the configured message will display. Button options will be *Continue scanning* or *Stop*.

NOTE: For all the other sorting options, the page that is “sorted” — diverted to the destination tray — is the single page that satisfies the rule. For Document Index sorting, an entire document (as defined in Capture Pro) is affected by the sorting rule. The document could contain one or many pages. Pages are diverted to the destination until a document index that does NOT meet the rule is recognized. At that point scanned pages return to output in the normal destination.

You can setup indexing formulas that check the accuracy of metadata contained in OCR, bar code and mark detection zones. If OCR, barcode or mark detection reading misinterprets data, the indexing formula can catch the errors and stop the scan.

- For information on creating input formats, see “Input formats” later in this section.
- For information on creating output formats, see “Output formats” later in this section.
- For information on setting up indexes for output to SharePoint, see “Using the SharePoint Index Setup wizard” later in this section.

Following are descriptions of the fields on the Index tab:

Action when audit fails—select the action you want the scanner to take when an audit fails.

- **Continue scanning:** keep scanning even when the audit finds illegal index values.
- **Stop scanning:** stop scanning and automatically enter Index Editing mode when the audit finds illegal index values.

The **Indexes** field displays the values that are setup for each index: **Name**, **Type**, **Default Value**, **Input Format**, **Output Format**, **Read-only**, and **Hidden**. You can edit, delete and move a value up or down in the list or add a new value by using the following buttons:

- **Add**: opens the Document Add Index Field dialog box to create a new index field in a document or the Batch Add Index Field dialog box to create a new field in a batch.
- **Edit**: opens the Document Edit Index Field dialog box to modify an index field in a document or the Batch Edit Index Field dialog box to modify an index field in a batch.
- **Delete**: removes the selected index field.
- **Move up**: moves the selected index field up one position in the index list.
- **Move down**: moves the selected index field down one position in the index list.

Adding a document index field

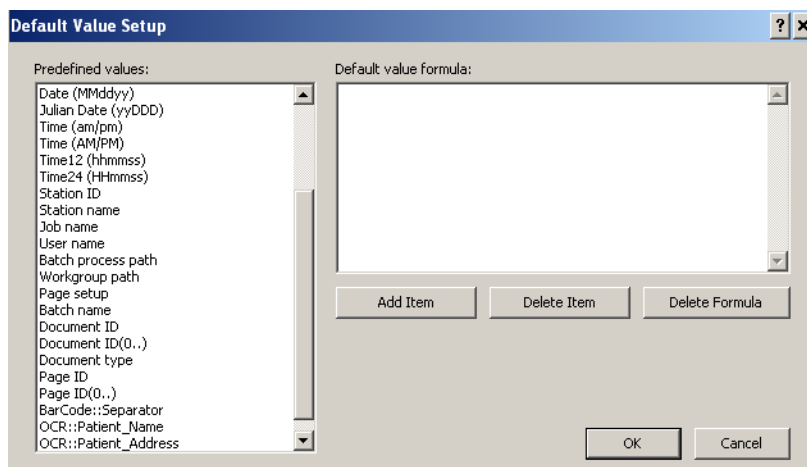
To add a document index field:

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job from the *Job Name* drop-down list and open the Index tab.
3. Open the **Document** tab.
4. Click **Add**. The Document - Add Index Field dialog box will be displayed.

5. Enter the name of your index in the *Label* field.
6. Enter any notes or comments in the *Description* field.

7. Select either **Single Value**, **Drop-down list**, **Drop-down list, multiple selection** or an index API (if available) from the *Type* field. **Single Value** allows to you enter any value. **Drop-down list** allows you to set up a fixed list of values to choose from (e.g., if you want to provide a list of countries to choose from). **Drop-down list, multiple selection** is similar to **Drop-down list**, except you will be able to select multiple values from the list.

NOTE: If you created your own index API it will appear in the *Type* drop-down list. When you select an index API, the **Setup** button will become available. Click the **Setup** button to make any configuration changes.
8. If you selected **Single Value**, you can check **Read only** to make this index non-writable. This protects crucial information from being deleted by users.
9. Check **Required** to make this index a must-have check item.
10. Check **Double Entry** to allow an additional data entry of the index field. For more information, see “Double data entry” later in this chapter. The *Field Type* must be **Single Value** and the field may not be **Read only** or **Hidden**. Automatic indexing on the first data entry may be set up to specify an OCR, Bar Code, or OMR zone.
11. If you selected **Single Value**, you can check **Hidden** to hide this index from users. This protects sensitive information.
12. Enter a number to define the shortest valid length of the index field in the *Minimum index field length* field.
13. Check the **Check field during scanning** box if you want the system to check index fields when scanning pages.
14. Enter a predefined value in the *Default value* field or click **Setup** to display the Default Value Setup dialog box and set your own values.



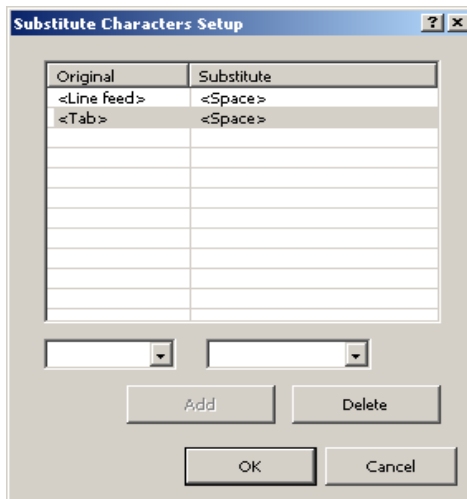
NOTE: If you created a bar code, OCR or mark detection zone, it will be displayed in the Predefined values list (e.g., BC_[zonename] or OCR_[zonename]. To use a bar code/OCR zone for an Index field, you must assign the appropriate BC_[zonename]/OCR_[zonename] as a default value for the index field. You may need to scroll to the bottom of the Predefined value list to see the Bar code/OCR/Mark detection index fields.

Use the Default Value Setup dialog box to create or revise a formula for the default value of the index field.

- Select a predefined value from the *Predefined Values* list. The Default Value Formula (if any) will be displayed on the right side of the box.
- Click **Add Item**.

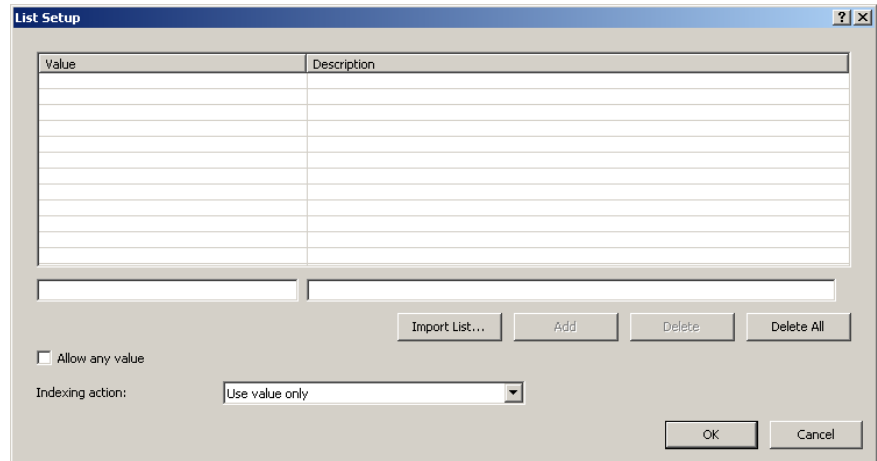
NOTE: **Delete Item** removes the last predefined value that was added to the Default Value Formula; **Delete Formula** removes the entire Default Value Formula.

- Click **OK** when finished. The revised formula will be populated into the Default Value text box.
15. Enter your input format. See “Input formats” later in this chapter for more information.
 16. Enter your output format. See “Output formats” later in this chapter for more information.
 17. If you want to define **Substitute Characters**, click **Setup** to define character pairs for automatic substitution. The Substitute Characters Setup dialog box will be displayed.



- **Original** column—lists the old characters to be replaced. Select an original character from the drop-down list at the bottom of the column. Select the character that you want to replace with a substitute character. You can select **<Space>**, **<Linefeed>** or **<Tab>**. An original character can appear only once in the *Original* column.
- **Substitute** column—lists the new characters to be put in. Select a substitute character from the drop-down list at the bottom of the column. Select **<Space>**, **<Linefeed>**, **<Tab>** or **<Replace>**. A substitute character may appear more than once in the *Substitute* column.
- **Add**—click to add the original and substitute character pair that you selected from the two drop-down lists. If you only selected an original character, Capture Pro Software will default to **<Replace>** as the substitute character.
- **Delete**—deletes the highlighted original and substitute character pair from the *Original* and *Substitute* columns.

18. If you want to define a value list for the index field, click **Setup** next to the **List** box. The List Setup dialog box will be displayed.



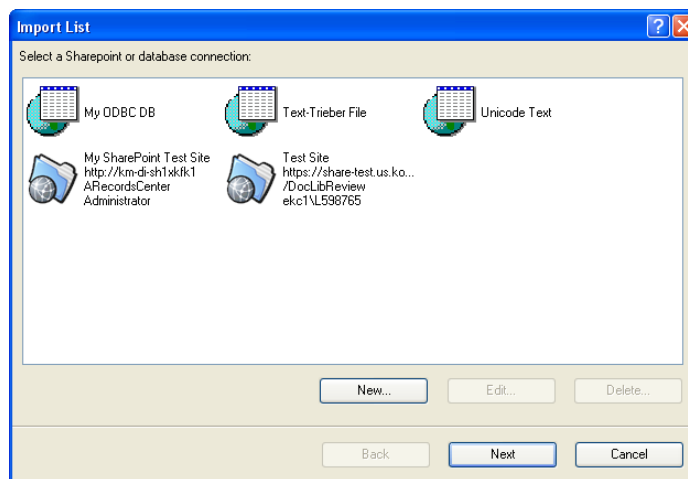
You can select to manually enter list values or import a list of existing values from an ODBC-compliant data source or a SharePoint library.

Manual entry

- Enter the desired value in the text box in the *Value* column.
- Enter a description of the value in the text box in the *Description* column.
- Click **Add** to add the value and description pair that you entered in the two text fields. If you did not create a description, that row in the *Description* column will be blank.

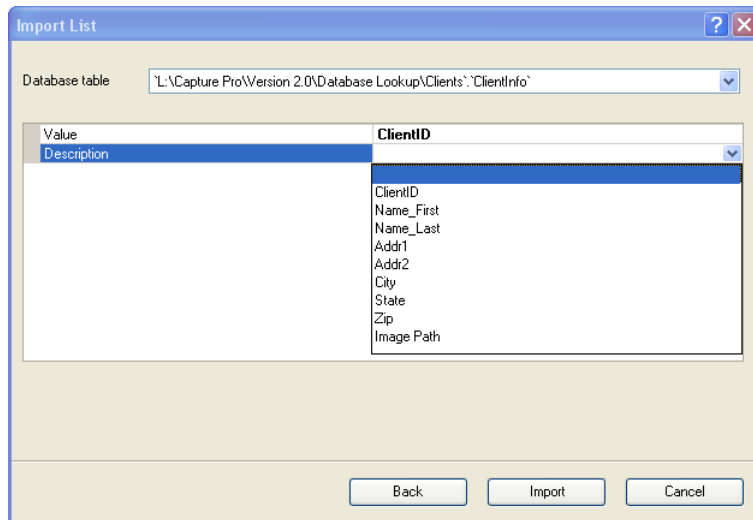
Importing a list

- Click **Import List**.
- Create a new SharePoint or ODBC connection or select an existing connection.



- Click **Next**.
- Select the column that will be used to populate the *Value* field and select a column that will be used to populate the *Description* field.

- Click **Import**. All unique values and the associated descriptions, if specified, will be imported. If a matching value is already in the list, it will not be replaced by the imported value. Imported values will be appended to the list.



NOTE: Click **Delete** if you want to remove a value or click **Delete All** to delete all entries in the list.

- Check **Allow any value** if you want to set no limitation on index values.
 - Select an *Indexing action* from the drop-down list: **Use value only**, **Use description only** or **Use value and description**.
 - Click **OK** when finished and return to the Document - Add Index Field dialog box.
19. Click **OK** on the Document - Add Index Field dialog box. The new document index information will be displayed in the table in the Document tab.

NOTE: To sort the table in ascending or descending order, click on the appropriate column header. If you click on the *Value* column header, the table will be sorted by the values in the *Value* column. If you click on the *Description* column header, the table will be sorted by the values in the *Description* column.

20. Click **OK** to save and exit the Job Setup dialog box.

Editing a document index field

To edit a document index field:

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job from the *Job Name* drop-down list and open the Index tab.
3. Open the **Document** tab.
4. Select an index field.
5. Click **Edit**. The Document - Edit Index Field dialog box will be displayed.

Document - Edit Index Field

Label: Patient Date of Birth

Description: First line on the right

Type: Single Value Setup...

☐ Read-only ☐ Required ☐ Double Entry

☐ Hidden Minimum index field length: 0

☒ Check field during scanning

Default value: <sys.date:MMddyy> Setup...

Input format: ?<0>

Output format:

Substitute Characters: Setup...

List: Setup...

OK Cancel

6. Change the information in the dialog box as desired and click **OK**.

Adding a batch index field

To add a batch index field:

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job from the *Job Name* drop-down list and open the Index tab.
3. Open the **Batch** tab.
4. Click **Add**. The Batch - Add Index Field dialog box will be displayed.

Batch - Add Index Field

Label: Branch location

Description: located in upper right corner

Type: Drop-down list Setup...

☐ Read-only ☒ Required ☐ Double Entry

☐ Hidden Minimum index field length: 4

☒ Check field during scanning

Default value: Setup...

Input format: ?<0>

Output format:

Substitute Characters: <Space> --> <Tab> Setup...

List: Setup...

OK Cancel

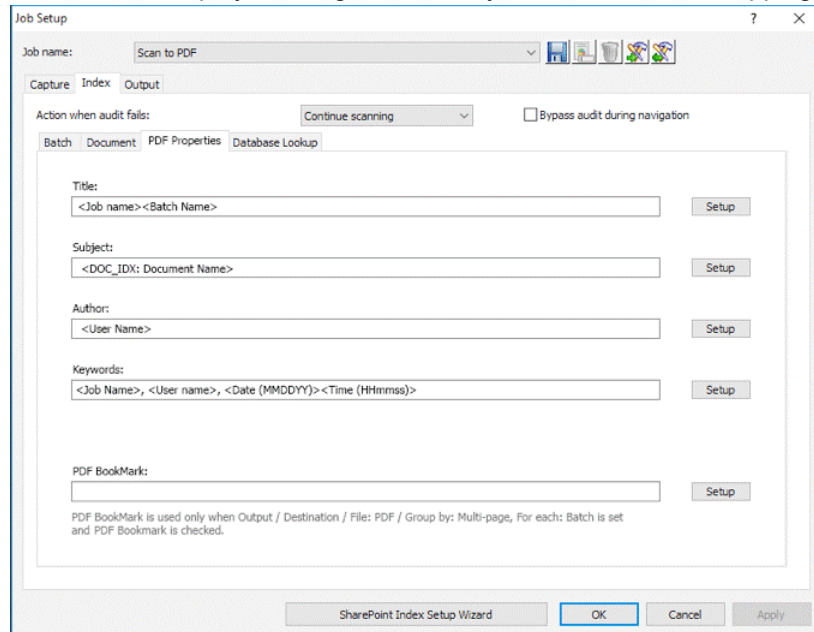
5. Complete the information in the dialog box and click **OK**. See “Adding a document index field” earlier in this chapter for detailed field descriptions.
6. Click **OK** to save and exit the Job Setup dialog box.

PDF Properties

The PDF Properties tab allows you to specify a value for each document bookmark or to assign index values to PDF properties meta data.

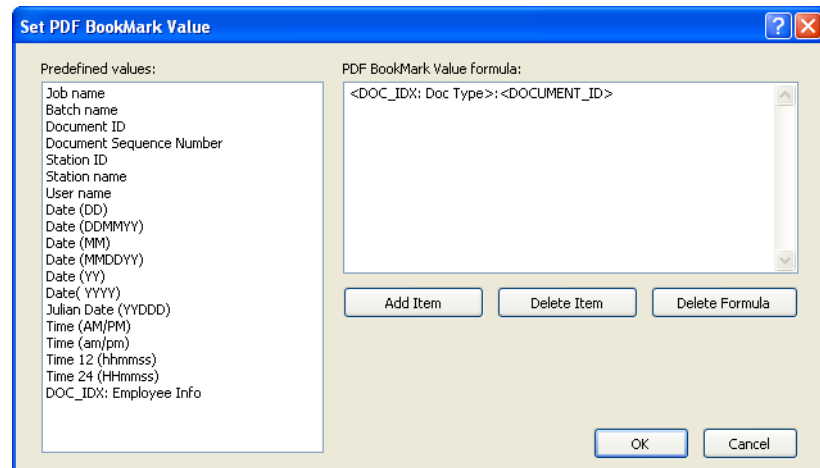
NOTE: For this feature to work effectively, be sure Group by **Multi-Page** for each **Batch** is selected in the PDF Setup dialog box. See “Setup options for File (1) and File (2)” later in this chapter.

The PDF properties **Title**, **Subject**, **Author**, and **Keywords** may be mapped to system values, document indexes, or batch indexes. Use the **Setup** button for each field, to display a dialog box where you can define the mapping.



To define **Title**, **Subject**, **Author**, or **PDF Bookmark**:

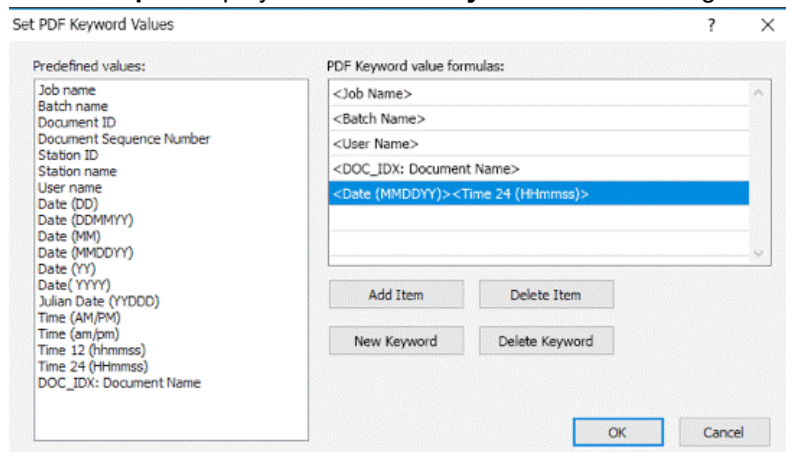
1. Click **Setup** to display the **Set PDF Bookmark Value** dialog box.



2. Select the desired predefined value from the list and click **Add Item**.
3. Click **OK** when finished.

To define **Keywords**:

1. Click **Setup** to display the **Set PDF Keyword Values** dialog box.



2. To add to the currently highlighted keyword formula, select the desired predefined value(s) from the list and click **Add Item**.
3. Click **Delete Item** to remove the predefined value at the end of the highlighted formula.
4. To create a formula for a new keyword, select the desired predefined value(s) from the list and click **New Keyword**.
5. Click **Delete Keyword** to remove the highlighted keyword formula from the table.
6. Click **OK** when finished.
7. Click **Cancel** to lose your changes and close the dialog box.

Double data entry

Double Entry allows for two index entry operators to index the documents separately to improve the accuracy of the index data.

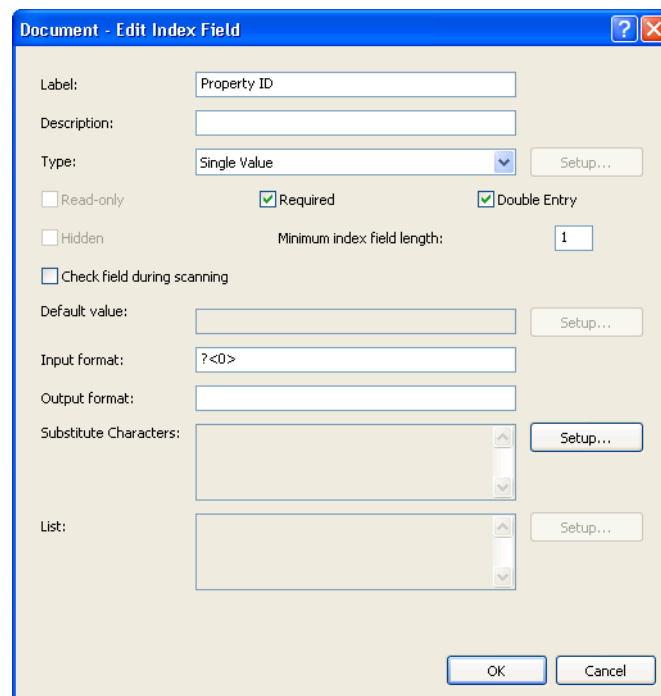
When scanning is complete, the operator selects **Index1** from the Index menu to indicate that the batch is ready for the first index operation.

The first index operator enters the index values for the batch and for each document. When complete the index operator selects **Index2** from the Index menu to indicate that the batch is ready for the second index operation.

Double entry setup

To use Double Entry one or more batch or document index fields must be configured for Double Entry.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job from the *Job Name* drop-down list and open the Index tab.
3. Open the Batch or Document tab.
4. Select the desired Double Entry index field and click **Edit**. The Batch or Document - Edit Index Field dialog box will be displayed.



5. Check the **Double Entry** checkbox.

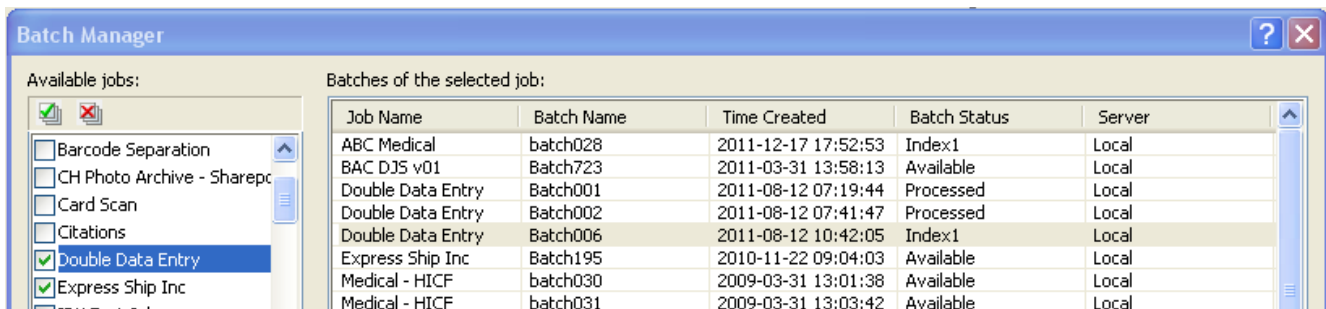
NOTES:

- The *Type* must be *Single Value*.
- The index field may not be read-only, therefore, **Read-only** is disabled.
- The index field may not be hidden, therefore, **Hidden** is disabled.
- The only way to set up a default value for a double data entry field is by using an automated index field such as OCR or bar code value. If that behavior is desired, select the OCR zone or bar code zone in the **Default Value Setup** dialog box.
- If any of the above configuration settings are not correct, the **Double Entry** checkbox will be unchecked and disabled.

Double entry operation

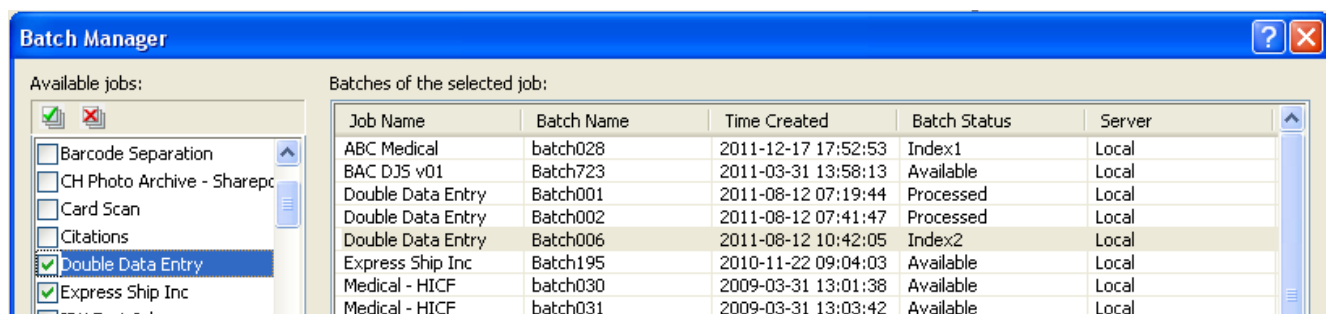
A job that has one or more batch or document index fields configured for Double Entry is used to scan documents like any other job.

When document scanning is complete and the batch is ready for indexing the operator selects **Index>Index1**. This changes the Batch Status from *Available* to *Index1*, meaning the batch is ready for the entry of the first set of index values.



Job Name	Batch Name	Time Created	Batch Status	Server
ABC Medical	batch028	2011-12-17 17:52:53	Index1	Local
BAC DJS v01	Batch723	2011-03-31 13:58:13	Available	Local
Double Data Entry	Batch001	2011-08-12 07:19:44	Processed	Local
Double Data Entry	Batch002	2011-08-12 07:41:47	Processed	Local
Double Data Entry	Batch006	2011-08-12 10:42:05	Index1	Local
Express Ship Inc	Batch195	2010-11-22 09:04:03	Available	Local
Medical - HICF	batch030	2009-03-31 13:01:38	Available	Local
Medical - HICF	batch031	2009-03-31 13:03:42	Available	Local

When the first index operator has entered the index values for all documents they will select **Index>Index2**. This changes the Batch Status from *Index1* to *Index2*, meaning the batch is now ready for the entry of the second set of index values.



Job Name	Batch Name	Time Created	Batch Status	Server
ABC Medical	batch028	2011-12-17 17:52:53	Index1	Local
BAC DJS v01	Batch723	2011-03-31 13:58:13	Available	Local
Double Data Entry	Batch001	2011-08-12 07:19:44	Processed	Local
Double Data Entry	Batch002	2011-08-12 07:41:47	Processed	Local
Double Data Entry	Batch006	2011-08-12 10:42:05	Index2	Local
Express Ship Inc	Batch195	2010-11-22 09:04:03	Available	Local
Medical - HICF	batch030	2009-03-31 13:01:38	Available	Local
Medical - HICF	batch031	2009-03-31 13:03:42	Available	Local

The second index operator will not see the values entered by the first index operator.

If the value entered by the second index operator matches the first value, no action is required and indexing continues.

If the first and second values do not match, the Entry Resolution dialog box will be displayed and the correct entry is selected by the operator.

NOTES:

- If the scanning operator is also entering the first set of index values they will need to select **Index>Index1** followed immediately by selecting **Index>Index2** when scanning and the first index operation is complete.
- The comparison of the Index1 and Index2 values is case sensitive. For example "UPPER CASE" is not a match to "Upper Case". Also leading zeros are significant. For example, the value 123 is not a match to 0123.
- Double Entry index fields will have all leading and trailing white space removed before the value is saved.

For example, if the value " Shipment " is entered, the value is saved as "Shipment". This means that if Index1 is entered as " Shipment" and Index2 is entered as "Shipment " the values will be a match.

Entry resolution

The Entry Resolution dialog box is displayed when the second index value matches the first index value.

The dialog box titled "Entry Resolution" has a blue header bar with a question mark icon and a close button. The main area is light beige. It contains a table with two columns: "Field:" and "Property ID". Below the table, there are three rows of input fields and buttons. The first row shows "Entry1:" with the value "1I2" and a button labeled "Entry1". The second row shows "Entry2:" with the value "1I2" and a button labeled "Entry2". The third row shows "New Entry:" with an empty text box and a button labeled "New Entry". At the bottom right, there is a "Cancel" button.

The index operator has the following choices:

- Select the entry made by the first index operator by selecting **Entry1**.
- Select the entry they made by selecting **Entry2**.

The dialog box titled "Entry Resolution" is the same as the previous one, but the "New Entry:" text box now contains the value "1L2". The "Entry1" and "Entry2" buttons are still present, along with the "New Entry" and "Cancel" buttons.

- Enter a new value in the *New Entry* field if neither entry is correct.
- Cancel and close the Entry Resolution dialog box if they do not want to make a choice. If the decision is made to not resolve the mismatched index value on one or more required index fields, the following message will be displayed if an attempt is made to output the batch, ***One or more index fields require Double Entry. You may not output the batch at this time. Do you wish to enter Index Mode?***

If none of the Double Entry fields are required, the Entry Resolution dialog box will be displayed on output. All Double Entry index fields with entry mismatches must be resolved before output.

NOTES:

- If a Double Entry field is not a required field then one or both of the index entries may be left blank and the Entry Resolution dialog box will not be displayed; there will be no error on output.
- If both Double Entry values are entered and do not match, the operator must make a selection on the Entry Resolution dialog box before output.
- An index field enabled for Double Entry may not be used to perform a Database Lookup or be a field verified or populated by Database Lookup.

Input formats

An **Input Format** is a text expression used to audit the user input for a particular index field. Its purpose is to prevent incorrect data from being entered into index fields. The syntax of the input format can be one or a combination of the following formats:

- Text formats
- Number formats
- Time formats
- Fixed string formats

Input Text formats

#

#<maxlength>

#<minlength, maxlength>

— used to represent a single character of a specific type. **#** may be one of the following character types:

9: valid input character set includes '0', '1', ..., '9'

Z: valid input character set includes 'A', 'B', ..., 'Z'

z: valid input character set includes 'a', 'b', ..., 'z'

A: valid input character set includes all characters in Z and z type

C: valid input character set includes all characters in Z and 9 type

c: valid input character set includes all characters in z and 9 type

X: valid input character set includes all characters in Z, z and 9 type

?: valid input character set includes any characters

Examples

999999

Description — 6 numeric characters

Valid input examples

123456

888888

Invalid input examples

ABCDEF wrong character type

1234567 too long

12345 too short

ZZZ999?

Description — 7 characters, first three characters are uppercase alphabetic letters, next three characters are numeric, last character is any character.

Valid input examples

BAT001%

BOX123a

Invalid input examples

BAT12b3 sixth character must be a numeric

Bat123a second and third letters must be uppercase alphabetic characters

BAT12345 too long

#<maxlength> — used to represent a variable length text value that has no minimum length but may have a maximum length.

- If maxlength is 0, there is no limitation on the length of the input value.
- If maxlength is greater than 0, the length of the input value length must be less than or equal to maxlength.

The maxlength may not be less than 0.

Examples

A<6>

Description — a string that may contain 6 or less alphabetic characters.

Valid input examples

A
ABCDEF

Invalid input examples

ABC123 last three characters must be alphabetic characters
ABCDEFGH too long

?<0>

Description — any text value.

#<minlength, maxlength> — used to represent a fixed or variable length input value that may have a minimum and maximum length.

- If **minlength** is 0, the input string may be empty.
- If **minlength** is greater than 0, the input value length must greater than or equal to minlength.
- The **minlength** may not be less than 0.
- If **minlength** is equal to maxlength, the input value must have the specified number of characters.

Examples

X<2,10>

Description — an input value that contains 2 to 10, upper or lower case alphabetic or numeric characters.

Valid input examples

Batch0001
1234abcABC
A1

Invalid input examples

Batch-001	The '-' character is not a valid 'X' character
A	too short
1234abcdABCD	too long
AB Inc	space character is not a valid 'X' character

?<3,0>

Description — a string that contains 3 or more characters of any type.

Valid input examples

ABC

+%=

ABC Company

smith@ABC.com

Invalid input examples

A1 too short

A<4,4>

Description — a string of exactly 4 alphabetic characters. The same format as AAAA.

9<0,3>

Description — a string of 3 or less numeric characters. String may be empty.

A<3,2>

Description — invalid input format, maxlength must be greater or equal to minlength if maxlength is greater than 0.

Input Number formats

#

#(min, max)

#(min, max]

#[min, max)

#[min, max]

— used to represent one of the following number types:

i : integer number that may be positive or negative and does not contain a decimal point

n : any number, positive or negative and may contain a decimal point.

The value range or precision of the number is limited by the operating system.

The valid number range is typically:

i : -2,147,483,648 to 2,147,483,647

n : 1.7 E ±308 (15 digits)

The min and max values define the range of the number value.

The value of min and max must be consistent with the number type. For example, if the number type is i, both min and max must be a valid integer number.

The character * may be used in place of min or max and represents an infinite value or no limit.

The max value must be greater than or equal to the min value.

(: input value must be greater than min.

) : input value must be less than max.

[: input value must be greater than or equal to min.

] : input value must be less than or equal to max.

Examples

i

Description — any integer number.

Valid input examples

123
-456

Invalid input examples

123.456 must be an integer. Decimal values are not allowed
-123. integer values cannot have a decimal point

n

Description — any integer or decimal number.

Valid input examples

123
123.456
-123.

#(min, max) — used to specify a value that is **greater than** min and **less than** max.

Examples

i(-100, 100)

Description — any integer number **greater than** –100 and **less than** 100.

Valid input examples

-99
0
99

Invalid input examples

-100 too small, must be greater than –100
-99.9 must be an integer (decimal not allowed)
100 too large, must be less than 100

#(min, max] — used to specify a value that is **greater than** min and **less than or equal** to max.

Examples

i(-100, 100]

Description — any integer number **greater than** –100 and **less than or equal** to 100

Valid input examples

-99
0
100

Invalid input examples

-100 too small, must be greater than –100
-99.9 must be an integer (decimal not allowed)
101 too large, must be less than or equal to 100

#[min, max) — used to specify a value that is **greater than or equal** to min and **less than** max.

Examples

n[-100, 100)

Description — any number **greater than or equal** to –100 and **less than** 100.

Valid input examples

-100
-99.9
99.9999

Invalid input examples

-100.1 too small, must be greater than –100
100 too large, must be less than 100

#[min, max] — used to specify a value that is **greater than or equal** to min and **less than or equal** to max.

Examples

n[-100, 100]

Description — any integer number **greater than or equal** to –100 and **less than or equal** to 100.

Valid input examples

-100
0
100

Invalid input examples

-100.1 too small, must be greater than or equal to –100
100.001 too large, must be less than or equal to 100

i[100, *)

Description — any integer number greater than or equal to 100

Valid input examples

100
1000

Invalid input examples

99 too small, must be greater than or equal to 100
100.5 integer values cannot have a decimal point

i(-1.0, +1.0)

Description — this is an invalid input format because the min and max are not integer values as the “i” specifies.

n(+1.0, -1.0)

Description — this is an invalid input format because max is less than min.

Input time formats

T<timeformat>

timeformat is a text string expression of the date/time value. The syntax can be one or a combination of the following elements:

yyyy	year (1000-9999)
yy	year (00-99, for 00-79, it means 2000-2079, for 80-99, it means 1980-1999)
MM	month (01-12)
dd	day of month (00-31, validate date when year and month are available)
DDD	day of year (001-366, validate date when year and month are available)
HH	hour (00-23)
hh	hour (01-12)
mm	minute (00-59)
ss	second (00-59)
TT	AM/PM
T	A/P
tt	am/pm
t	a/p
"text"	text is a fixed text string.

The following date/time elements cannot be repeated in the timeformat. For example, if you have selected **yyyy** for year date format, you cannot use yy or another yyyy in the timeformat. This limitation includes:

yyyy and yy
dd and DDD
HH and hh
HH, TT, T, tt and t

Examples

T<yyyyMMdd>

Description — a full date.

Valid input examples

20051025
19000101

Invalid input examples

2005/10/25	unexpected character /
20051032	invalid date
20050229	invalid date (because the year 2005 was not a leap year)
00990101	date is earlier than 1000

T<MMdd>

Description — a date without a year specified.

Valid input examples

1201

1231

0229

Invalid input examples

0001 invalid month

0230 invalid date of February regardless if it is a leap year

ABCDEF invalid text

T<HH":"mm":"ss>

Description — a time with : as separator.

Valid input examples

23:59:59

00:00:00

Invalid input examples

99:59:00 invalid hour

120000 no separator

T<hhmmsst>

Description — a full time.

Valid input examples

010000a

120000p

Invalid input examples

010000A A should be lower case

000000a invalid time

1355101 invalid hour must be 00-12

T<HHmmssTT>

Description — this is an invalid input format because HH represents 00 to 23 hours and TT represents AM/PM which is not valid with a 24-hour time string.

T<yyyyMMyyyy>

Description — this is an invalid input format for yyyy because it was used more than once in a timeformat.

Input fixed string formats

"text"

text is any text string. Because the start and end of the text string is defined by the character " (double quote), the double quote character is not allowed in the text string. A text string format is normally used in combination with other input formats.

Examples

999"_"99"_"999

Description — fixed string (to define a United States Social Security number).

"ID"

Description — fixed string.

Valid input examples

ID

Invalid input examples

XX does not match text in format. Input must be: ID

"Text"ABC""

Description — this is an invalid input format because it includes two extra " characters in the format.

Combination input formats

An input format can consist of multiple formats that are used in combination. To use multiple formats to define an input format connect the format expressions together with or without a blank space.

No format expression may follow a format that is of variable length. For example: A<1,0>"-Comment" is not valid because A<1,0> may be any length. The format: "Comment-"A<1,0> is valid because the variable length format is at the end of the combination input format.

Following are valid and invalid combination formats.

Examples

"ID"999999

Description — combined formats: "ID" and 999999.

Valid input examples

ID123456

Invalid input examples

IDabcdef the letters abcdef must be numbers

id123456 the first two letters id do not match format which is ID

"DATE"T<yyyyMMdd>

Description — combined formats "DATE" and T<yyyyMMdd>.

T<"DATE"yyyyMMdd> is equivalent to the above format.

Valid input example

DATE20051025

Invalid input examples

n?<0>

Description — this is an invalid input format for the number specified. *n* is a variable length and no additional format can follow it.

A<2,3>"XX"

Description — this is an invalid input format because A<2,3> specified a variable length and no additional format can follow it.

A<3,3>"XX"

Description — combined with formats: A<3,3> and "XX".

Valid input example

XYZXX

Invalid input examples

XXXXXX unexpected X at the end of the text string.

20051025 the text DATE must proceed the date

DATE20051032 October does not have 32 days

XXXXXXXX too long, extra X at the end of the string

Index Default value specification

Default value expression is a text expression to set the default value for a particular index field. In default value expression, you need to define the default value by using one or more predefined tags (i.e., system, barcode/OCR/mark detection value) or a fixed string. You can also define multiple options of the default value by connecting tags with the OR keyword.

Tags

<tagname>

<tagname:transformexpression>

tagname is a predefined system, OCR, mark detection or barcode zone data expression. System data expressions include date, time, Station ID and name, Job and User name, batch and workgroup path, document and page ID and Last Value.

transformexpression is used to transform the format of the system or barcode/OCR value. For example the date is expressed as MMddyy, the transform expression may change the format to MM/dd/yyyy. See the next section for a description of transform expression.

Check **Double Entry** to allow an additional data entry of the index field. For more information, see "Double data entry" in this chapter. A default value may not be entered when using Double Data Entry; the Field Type must be Single Value and the field may not be Read only or Hidden.

NOTES:

- The Type must be Single Value.
- The index field may not be read-only, therefore, Read-only is disabled.
- The index field may not be hidden, therefore, Hidden is disabled.
- The default value must be left empty, therefore, Default Value Setup is disabled.
- If any of the above configuration settings are not correct, the Double Entry checkbox will be unchecked and disabled.

Fixed string formats

"text"

text is a fixed text string. The string delimiter character " (double quote) is not allowed in the format. A fixed text string format is normally used in combination with other formats.

Using multiple tags

A default value may include more than one tag expression used in combination. For example you may want the default value to include the date, time and Station ID separated by a dash. To do this concatenate them together.

For example:

<sys.date:ddMMyy> "-" <sys.time:hmmss> "-" <sys.stationid>

Using the OR keyword

The OR keyword may also be included in the default value expression. This may be useful when a value may not always be present. You may want to set the default value to the value of a barcode that appears on the document.

For example:

<barcode.UPI ID Number>

If no barcode is found on the document, the index field will be empty. The OR keyword can be used to provide an alternate value.

For example:

<barcode.UPI ID Number> OR "Barcode not found on document:"

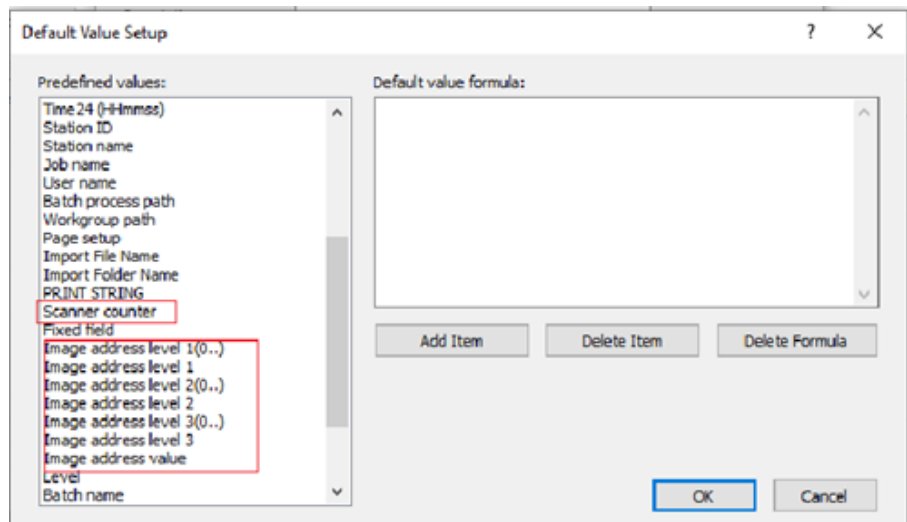
<app.documentid>

As many expressions as needed may be OR'd

Default Value Option #1 OR Default Value Option #2 OR ... OR Default Value Option #n

The system will check the Default Value Option # one-by-one from left to right, and use the first valid data to initialize the index data.

Available Tags — the following displays the available default value tags:



NOTE: Barcode/OCR/Mark Detection zones will be displayed at the bottom of the default value list.

Default value using LASTVALUE

When **lastvalue** is selected as the default value, Capture Pro Software automatically uses the last assigned value for an index field from the previous document (for document indexes) or previous batch (for batch indexes) whenever a new document or batch is created. This is useful, for example, in a backlog application, when you scan folders of documents with the same date. When you start scanning into a new batch, and no index value is assigned yet, enter the date once and it remains the same for every new document after that until you change it.

lastvalue is also useful when performing bar code indexing but not every document scanned will have a bar code attached to it. For example, a default value expression of:

`<barcode.Patient ID> OR <app.lastvalue>`

means that when a new document is scanned, assign the index field value to the value of the bar code zone "Patient ID" *<barcode.Patient ID>*. However, if the document did not have a bar code on it, assign the index field instead to the value of the previous document *OR <app.lastvalue>*.

Transform Expressions

A Transform Expression is a text expression to format or transform the data of a particular field into a default or output value. Transform Expressions are used to define default values and output format for an index field.

Default value specification: when a new batch or document is created, the index field will be populated with a value based on the default value specification. The default value specification is entered on the Index tab and takes the form <tagname> or <tagname:transform expression>. The transform expression is described below.

Examples:

<sys.date:ddMMyy>

<sys.stationid:[1,5]>

Output format: when a batch is output, the index data for the batch and for each document in the batch will be reformatted based on the output format. For instance, a date index with a value of MMddyy can be reformatted to: MM/dd/yyyy.

The output format is entered on the Index tab and takes the form: transform expression.

Examples:

ddMMyy

[1, 5]

The syntax can be one or a combination of the following formats:

- Text formats
- Number formats
- Time formats
- Fixed string formats

Transform text formats

[start]

[start, end]

[index, 'delimiter']

[start; len]

These formats are used to extract a sub-string from the original index value.

[start] — used to extract a sub-string starting at the position start to the end of the original value.

- If start is a positive number, the start position will be counted from the beginning of the original value.
- If start is a negative number, the start position will be counted from the end of the original value.
- If start is 0 or *, the start position will be the beginning of the original value.

Examples

[5]

Description — get sub-string from the 5th character to the end of the original value.

“ABCDEFGHijkl” → “FGHIJKL”

“1234567890” → “567890”

“1234” → “”

[*]

Description — get full string.

“ABCEDFG” → “ABCEDFG”

“1234567” → “1234567”

[start, end] — used to extract a sub-string starting at the position start and ending at the position end of the original value.

- If end is a positive number, the end position will be counted from the beginning of the original value.
- If end is a negative number, the end position will be counted from the end of the original value.
- If end is 0 or *, the end position will be the end the original value.
- If the start position is after the end position, the sub-string will have the reverse order of the original value.

Examples

[1, 2]

Description — get sub-string from the 1st character to the 2nd character of the original value.

“ABCDEFGH” → “AB”

“123456” → “12”

[-4, -1]

Description — get sub-string from the 4th from the last character to the last character of the original value.

“ABCDEFGHIJK” → “HIJK”

“1234567890” → “7890”

[:, 5]

Description — get sub-string from the 1st character to the 5th character of the original value.

“ABCDEFGHIJK” → “ABCDE”

[5,2]

Description — get sub-string from the 5th to the 2nd character in reverse order of the original value.

“ABCDEFGHIJK” → “EDCB”

“1234567890” → “5432”

[2, -2]

Description — get sub-string from the 2nd character to the 2nd from the last character of the original value.

“ABCDEFGHJIJ” → “BCDEFGHI”

“1234567890” → “23456789”

“AB” → “BA”

“A” → “A”

[index, ‘delimiter’] — used to extract the element at the position specified by index where each element in the index data is separated by the character delimiter. The first element is index 1.

NOTE: This transform expression is especially useful when assigning data elements in a PDF417 bar code to different index fields. It is also useful when assigning different lines of multi-line OCR results to different index fields. The delimited produced by multi-line OCR is the carat (^) character.

Examples

[2, ‘^’]

Description — get the 2nd element in the multi-line OCR where elements are separated by the ‘^’ character.

“John Smith^123 Main Street^Some City” → “123 Main Street”

[3, ‘*’]

Description — get the 3rd element from the PDF417 barcode where elements are separated by the ‘*’ character.

“John Smith*123 Main Street*Some City” → “Some City”

[start; len] — used to extract a sub-string for the position start for len characters.

Examples

[2;3]

Description — get sub-string from 2nd character with a length of 3 characters.

“ABCDEFGHJIJ” → “BCD”

“1234567890” → “234”

“AB” → “B”

“A” → “”

Transform number formats

#<width, fracwidth>
#<width, fracwidth, padding>
#<textformats, width, fracwidth>
#<textformats, width, fracwidth, padding>
0width

can be one of the following characters to define the desired number type.

n: generic number
N: generic number with sign
p: percentage number
P: percentage number with sign
c: currency number
C: currency number with sign

The value range or precision of the number is limited by the operating system.
The valid number range is $1.7E \pm 308$ (15 digits).

#<width, fracwidth> — used to format a number that has at most, width number of characters and at most, fracwidth characters after the decimal.

width defines the total number of digits to be included in the output string.

- If width is a positive number, the output text will be right-aligned with the padding character (if any) on the left.
- If width is a negative number, the output text will be left-aligned with the padding character (if any) on the right.

fracwidth defines the number of digits to be displayed to the right of the decimal point.

The number 0 is used to show no decimal point.

The * character is used to show a default of 6 digits to the right of the decimal point.

Examples

n<20,2>

Description — a generic number with a maximum width of 20 characters and 2 digits after the decimal point. The string will be right-aligned.

Examples

"324.5" → " 324.50"

"abcd" → " 0.00"

p<-20, 2>

Description — a number expressed as a percentage with a total width of 20 characters and 2 digits after the decimal point. The string will be left-aligned.

Examples

"0.12abc" → "12.00% "

"-43" → "-4300.00% "

c<20, 0>

Description — a number expressed as currency with a total width of 20 characters and no decimal point. The string will be right-aligned.

Examples

"12345.6" → " 12,346"

"-12345.6" → " -12,346"

C<20, 2>

Description — a number expressed as signed currency with a total of 20 characters and 2 digits after the decimal point. The string will be right-aligned.

Examples

"12345.6" → " +12,345.60"

"-12345.6" → " -12,345.60"

"abc" → " +0.00"

"-0.001" → " -0.00"

"-0.00" → " +0.00"

#<width, fracwidth, padding> — used to format a number that will be padded with the padding character, to the specified width, including fracwidth characters after the decimal point.

padding defines the character to fill the space if the formatted text is less than the width defined.

Example

P<20, 3, '#'>

Description — a number expressed as a signed percentage with a total width of 20 characters, 3 digits after the decimal point and padded with the '#' character.

Examples

"0.12abc" → "#####+12.0000%"

"-43" → "#####-4300.000%"

#<textformats, width, fracwidth> — used to format a number that is extracted from a string using textformats.

textformats specifies how to extract the number from the original index string. See the *Output formats* section.

Example

N<[2], 20, 3>

Description — a signed number with a total width of 20 characters and 3 digits after the decimal point. The number will be extracted starting at the 2nd character in the original string.

Examples

"A12345.6" → " +12345.600"

"-12345.6" → " +12345.600"

"TT9000" → " +0.000"

"—9999" → " -9999.000"

N<[2, '^'], 20, 3>

Description — a signed number with a total of 20 characters and 3 digits after the decimal point. The number will be extracted from the 2 elements in the string, where the elements are separated by the '^' character.

Example

"12345.6^45678.9" → " +45678.900"

#<textformats, width, fracwidth, padding> — used to format a number that is extracted from a string using textformats and padded with the specified character.

This format is an extension of the format #<textformats, width, fracwidth> where the output string will be padded with the specified character.

0width — used to zero-fill a number to the minimum specified width.

Examples

010

Description — a zero-filled number with a total width of 10 characters.

Examples

"123" → "0000000123"

"0" → "0000000000"

03

Description — a zero-filled number with a total width of 3 characters.

Example

"1" → "001"

"1234" → "1234"

Transform time formats

#

— may be one or any combination of the following formats:

yyyy	year (1900-2099)
yy	year (00-99)
y	year
MM	month (01-12)
M	month (1-12)
dd	day of month (01-31)
d	day of month (1-31)
D	day of week (1: Sunday, 2: Monday, etc.)
DDD	day of year (001-365)
HH	hour (00-23)
H	hour (0-23)
hh	hour (01-12)
h	hour (1-12)
mm	minute (00-59)
m	minute (0-59)
ss	second (00-59)
s	second (0-59)
TT	AM/PM
T	A/P
tt	am/pm
t	a/p
ww	week of year (01-53)
w	week of year (1-53)

When using time formats, you must specify an Input Time format to define the contents of the string that is to be formatted for output.

Examples

ddMMyyyy

Description — a date in day, month and year format.

Examples

Input Format: T<yyyyMMdd> the string “20051026” → “26102005”

Input Format: T<yyyyMM> the string “102005” → “102005”

Fixed string formats

text"

text is any text string. Because the start and end of the text string is defined by the character " (double quote), the double quote character is not allowed in the text string. A text string format is normally used in combination with other input formats.

Examples

"ID-[*]-XX"

Description — output fixed text string of "ID".

Examples

"20051026" ==> "ID-20051026-XX"

Combining Transform formats

A Transform Expression can consist of multiple formats that are used in combination. To use multiple formats to define a Transform Expression simply connect the format expressions together with or without a blank space.

Examples

"Revenue"c<20, 2>

Description — combination with formats "Revenue" and c<20, 2>.

Examples

"123456" ==> "Revenue 123,456.00"

yyyy"/"MM"/"dd"."HH":"mm":"ss

Description — combined with formats: yyyy, "/", MM, "/", dd, "-", HH, ":", mm, ":" and ss.

Examples

"20051026080405PM" ==> "2005/10/26-20:04:05"

Input Format: T<yyyyMMddhhmmssTT>

Output formats

An Output Format is a text expression to format the data of a particular index field into an output value. Transform Expressions are used to define the output format for an index field.

Output format: when a batch is output, the index data for the batch and for each document in the batch will be reformatted based on the output format. For instance, a date index with a value of MMddyy can be reformatted to: MM/dd/yyyy.

The syntax can be one or a combination of the following formats:

- **Text formats** — see *Transform Expressions, Text formats*
- **Number formats** — see *Transform Expressions, Number formats*
- **Time formats** — see *Transform Expressions, Time formats*
- **Fixed string formats** — see *Transform Expressions, Fixed string formats*
- **Combination formats** — see *Transform Expressions, Combining Transform formats*

Index tab — Database Lookup

Database Lookup can be used to populate or validate batch and document index fields from ODBC (Open Database Connectivity) compliant data sources. A configuration wizard is used to specify the data source, define how the lookup is performed and what data is used to populate index files or validate the contents of index fields. A job setup may contain more than one Lookup. Each Lookup can be to a different data source and used to populate or validate selected index fields. Lookups may occur during scanning when the index value used for the Lookup is a result of a barcode reader or an OCR action. Each Lookup takes the form: `SELECT <table column 1>, <table column 2>, ... <table column n> FROM <data source> WHERE <table column x> = <index field value> or select: WHERE <table column x> = <index field value> AND <table column y> = <index field value>.`

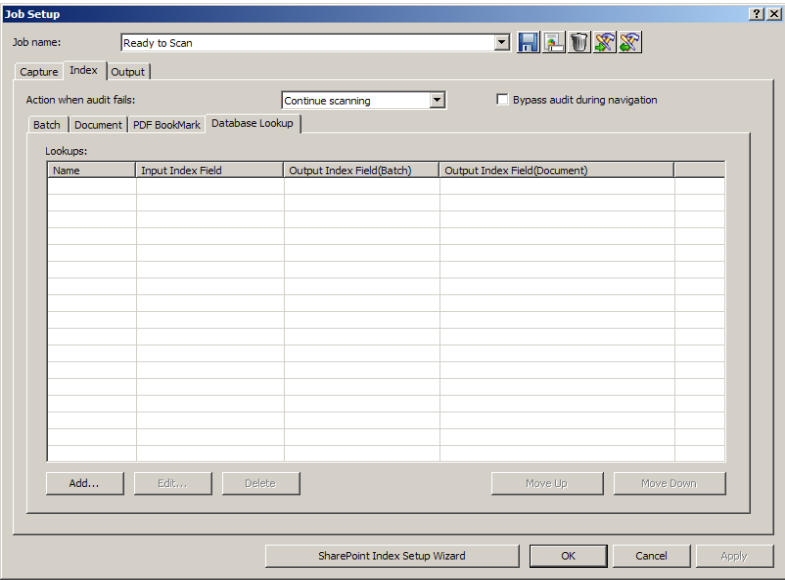
Configuring Database Lookup

Configuring Database Lookup starts with defining the batch and document index fields that will be used by the Lookup. Database Lookups are configured for each job.

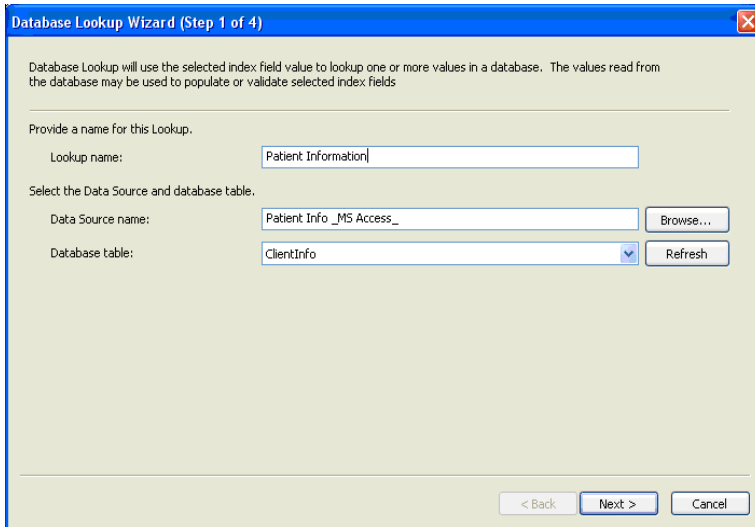
NOTE: Defining index fields in Job Setup has not changed from previous versions of Capture Pro Software.

To add or edit a new lookup:

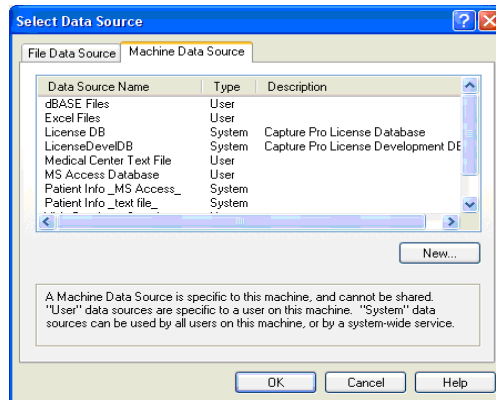
1. Click **File>Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list. The settings for the job setup will be displayed.
3. Select the **Index** tab.
4. Select the **Database Lookup** tab. The Lookups table will be displayed with the following fields: *Name*, *Input Index Field*, *Output Index Field (Batch)* and *Output Index Field (Document)* for each Lookup.



- Click **Add**. The Database Lookup Wizard will be displayed.



- Enter the name of your Lookup in the *Lookup name* field.
- Click **Browse** to open the Select Data Source dialog box.



- Select an existing *File Data Source* or *Machine Data Source*, or click **New** to create a new data source. Depending on the type of data source you have selected, you will be prompted for additional information.
 - Click **OK** after all required information has been entered.
 - After clicking OK, the SQL Server Login window displays. Enter all credentials and click **OK**.
- Select the table or file from the *Database table* drop-down list that contains the data that will be used to populate or validate the index fields.

9. Click **Next** to define how you want to do the data lookup.

The screenshot shows the 'Database Lookup Wizard (Step 2 of 4)' dialog box. The title bar includes a close button. The main area is titled 'How do data lookup?' and contains the following elements:

- A section titled 'How do you want to do data lookup?' with two radio buttons: 'Validate index fields from Lookup results' (unselected) and 'Populate index fields from Lookup results' (selected). There is also an unchecked checkbox labeled 'Create a document index to store the validation result'.
- A section titled 'Select the index field and the table column to look up.' containing two rows of dropdown menus. The first row has 'DOC_IDX:Patient ID' and 'DOC_IDX:Physician ID' separated by an 'And' label. The second row has 'Client ID' and 'Physician ID'.
- A section titled 'Select the fields you want to populate.' containing a table with two columns. The first column lists fields under a 'Batch' header (expanded) and a 'Document' header (expanded). The second column lists corresponding database fields.

Batch	
Document	
Patient Name	
Patient Address	Addr1
Treatment Code	

At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- Select **Validate index fields from Lookup results** if you want to verify one or more index field values that match data in your data source. Check **Create a document index to store the validation result** if you want to store the results of the look-up in an index field to be used for other processing, such as Sort by Document Index.
 - Select **Populate index fields from Lookup results** if you want to fill in one or more index fields from the Lookup.
10. Select the index field(s) to be used by the Lookup to find matching values in the selected database from the *Lookup index field* drop-down list. This list contains all defined document and batch index fields. If a single index field is to be used for the Lookup, it must be in the left column before the "And". If two Lookup index fields are provided, then only database records that contain both values will be matched. At the time of index data entry, if one value is not known, it may be replaced by the asterisk (*) character. For more information, see the section entitled, "Using Database Lookup" later in this chapter.
11. Select the table column(s) to be searched for values matching the selected Lookup index field from the *Lookup table column* drop-down list. This list contains all table column names from the selected database table.
12. For each batch or document index field that you want to populate or validate, select the database column that contains the desired data. Click in the column to the right of the index field name and select the database column from the drop-down list.

13. Click **Next** to choose the database lookup options.

The screenshot shows the 'Database Lookup Wizard (Step 3 of 4)' dialog box. The title bar is blue with a close button. The main area is titled 'Choose the Database Lookup Options'. Under the 'Options during capture' section, there are three checkboxes: 'Disable Lookup (this may improve capture performance)' (unchecked), 'Display multiple lookup results if there is more than one result' (unchecked), and 'Lookup will overwrite existing index value (this will only occur if the table column is not empty)' (unchecked). Below this, 'Disable Lookup during Output' is checked. At the bottom, 'Maximum multiple results to displayed:' is set to '5' with a range of '(5-500)'. Navigation buttons '< Back', 'Next >', and 'Cancel' are at the bottom right.

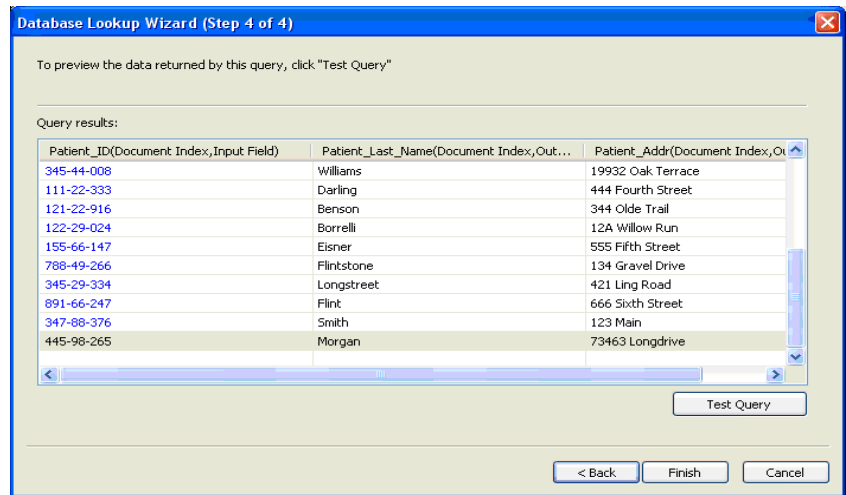
14. Select the desired Lookup options:

- **Disable Lookup:** when checked, Lookups will not be performed during scanning. This may improve performance with large or remote databases. Lookups will continue to occur in Edit Index mode and when the batch is output.
- **Display multiple lookup results if there is more than one result:** when unchecked, the Multiple Lookup Results table will not be displayed during scanning. Multiple Lookup results will be resolved in Edit Index mode, allowing scanning to continue uninterrupted.
- **Lookup will overwrite existing index value:** when checked, the Lookup will always populate an index field with the lookup value in the database, as long as the database entry has a value (i.e., is not empty or null). If you want users to be able to manually enter data into an index field that Database Lookup is populating, then this option should be unchecked.

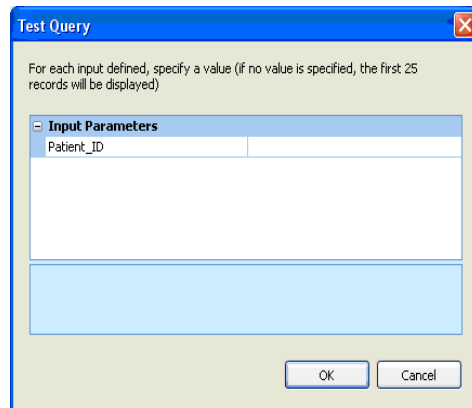
NOTE: Database Lookup will never overwrite data when the batch is output.

- **Disable Lookup during Output:** when checked, no Lookup (populate or validate) will occur during output. If unchecked, empty fields will be populated and missing or multiple records will be ignored. Validation will fail if no matching record is found.
- **Maximum multiple results to display:** when multiple lookup results are found, a table of the results will be displayed allowing you to choose the correct result. The value entered will limit the length of the table.

15. Click **Next** to test the Lookup.



16. Click **Test Query**. The Test Query dialog box will be displayed.



17. Enter a valid value for the parameter that is used to perform the Lookup. If you leave the value blank, the first 25 records in the data table will be displayed.

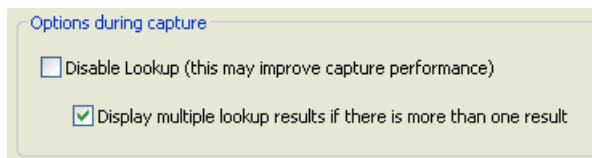
18. Click **OK**.

Using Database Lookup

After configuring a job to do a Database Lookup, it is important to understand when the Lookup will be performed. The following are common scenarios:

During Scanning - Populating index fields

When **Disable Lookup** during capture is not checked, Lookups will occur on-the-fly during scanning.



A screenshot of a dialog box titled "Options during capture". It contains two checkboxes. The first checkbox, labeled "Disable Lookup (this may improve capture performance)", is unchecked. The second checkbox, labeled "Display multiple lookup results if there is more than one result", is checked.

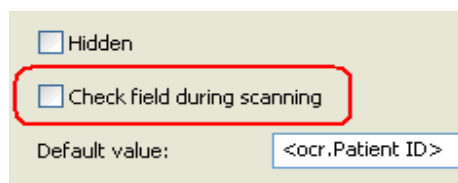
The Lookup will only take place when the index field that is being used for the Lookup has a value that was populated during scanning (e.g., as a result of a barcode, OCR or mark detection zonal read).

During Scanning - Validating index fields

When **Disable Lookup** during capture is not checked, Lookups configured for index field validation only will also occur on-the-fly during scanning.

The Lookup Validation will only take place when the index field that is being validated has a value that was populated during scanning (e.g., as a result of a barcode, OCR or mark detection zonal read).

NOTE: When **Disable Lookup** is not checked, Database Lookups will always be performed during scanning. Even if the Index Field setup option *Check field during scanning* is disabled, the Database Lookup validation will still be performed.



A screenshot of a form for setting up an index field. It has two checkboxes: "Hidden" (unchecked) and "Check field during scanning" (unchecked). The "Check field during scanning" checkbox is highlighted with a red rectangle. Below the checkboxes is a label "Default value:" followed by a text box containing the value "<ocr.Patient ID>".

Edit Index mode

After scanning has been performed and the user enters Index mode (**Index>Edit Index Fields**), the Lookup will always be performed on a document whenever the document is navigated to while in indexing mode.

If the index field that is being used for the Lookup already has a value (e.g., from barcode, OCR or mark detection zonal read) then the Lookup for a document will be performed automatically when navigating to the document.

If data is manually being entered in the index field, then the Lookup will be performed when the user leaves the index field. If the **Tab** key is used to navigate away from the index field just entered, the results of populating the other index fields will be displayed for verification. If the **Enter** key is used or one of the other indexing mode function keys (i.e., F9, F10, F11) to navigate to another document, then the Lookup will be performed and the other index fields will be populated. However, you will not see the results of the Lookup as that document is no longer being displayed in indexing mode.

If the Lookup index field is populated using Drag n' Drop OCR or clicking OCR, then the Lookup will be performed immediately and the results of populating the other index fields will be displayed for verification.

If the value being used for Lookup is only partially known, the asterisk character '*' may be used to replace the unknown character(s). The asterisk character must be the last character. For example, if the Lookup value is a phone number but only the first four digits are readable, the value "557-3*" may be entered. All phone numbers beginning with "557-3xx...." will be retrieved from the database and you may select the correct value.

When a Lookup is based on two values and only one value is known, the asterisk character may be used in place of the unknown value. For example, the Lookup is based on Last_Name AND First_Name and the Address will be looked up. If only the last name is known, it is entered in the index field "Last Name" and the asterisk character is entered in the index field "First Name". If only one record is found for the last name entered, the first name and address will be populated. If multiple records are found for the last name, the Multiple Results dialog box will be displayed and the correct entry may be chosen.

Batch output

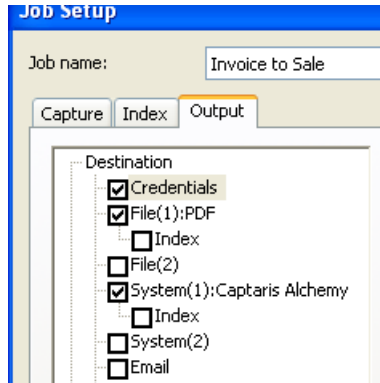
Database Lookup only occurs on output if the **Disable Lookup on Output** option is not checked. When you click the **Output** tool, as part of Index field validation, Database Lookup for populating and validating index fields is performed immediately before the batch is queued for output processing. If a Database Lookup is populating index fields, errors will be ignored. If no record is found or multiple records are found, the current value in the index field will be unchanged or left empty. If a Database Lookup is validating index fields, an error will occur if no matching record is found. The batch will not be submitted for output and the error must be corrected before the batch can be successfully output.

If a batch is output from the Batch Manager screen or is automatically output from Job Setup, Database Lookup is performed immediately as part of the background batch processing. If a Lookup fails, the batch will be put into *Index Error* status.

Health Claims - Doc...	Health197	2009-02-13 15:47:41	Processed	
Health Claims - Doc...	Health201	2009-02-25 16:24:44	Available	
Health Claims - Doc...	Health202	2009-02-25 16:26:03	Index Error	
Health Claims with P...	Health014	2009-04-01 10:59:44	Processed	
Health Claims with P...	Health018	2009-04-01 12:49:30	Available	
Health Claims with P...	Health019	2009-04-01 13:23:25	Available	

When the batch is opened to correct the error, the document that had the Lookup failure will be automatically displayed and you can go into Index mode to correct the indexing problem and re-submit the batch for output processing.

Job Setup: Output tab

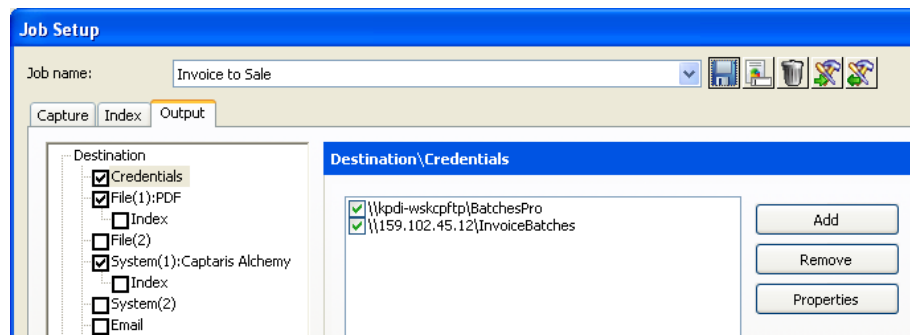


The Output tab is where you set up your output options for your job setup.

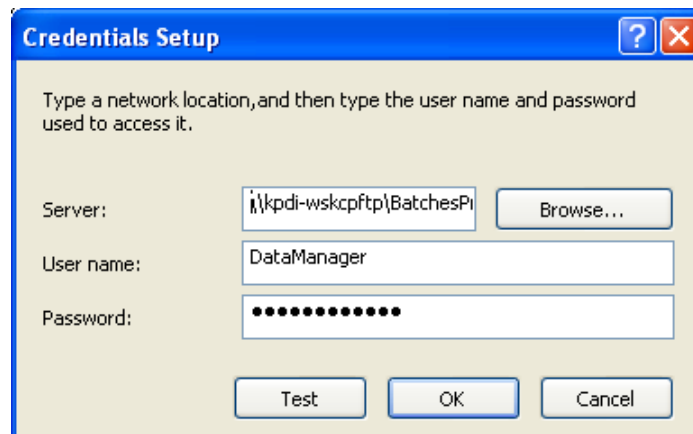
- **Destination** — allows you to make settings for the format of the output, where to send the output, and how to index it. The Destination options are:
 - **Credentials**: allows you to provide user access credentials for destination network file shares.
 - **File (1) and File (2)**: allows you to select your file format (TIFF, JPEG, PDF, PNG, etc.) and type of output (e.g., black and white, color/ grayscale).
 - **System (1) and System (2)**: allows you to select the System Output Destination for your job setup.
 - **E-mail**: allows you to setup the software to automatically e-mail the output.
 - **Print**: allows you to setup the software to automatically print the output.
- **Advanced Options** — allows you to apply Capture Pro Software image processing options to the output.
- **Invoke Other Program** — allows you to use another software application on your output.

Credentials

Select **Credentials** when the Destination output location is a network share for which the Capture Pro operator may not have access.



- **Add** — displays the Credentials Setup dialog box.



- Enter the server and share name in the format \\server_name\share_name. The server machine name or the server IP address may be entered.

- **Remove** — removes the selected credentials.
- **Properties** — displays the properties of the selected credentials. The user name and password may be changed.

The Credentials are not shared between job setups. If two jobs setups use the same network share, the credentials must be added to both job setups. This allows different job setups to access the same network share using different credentials.

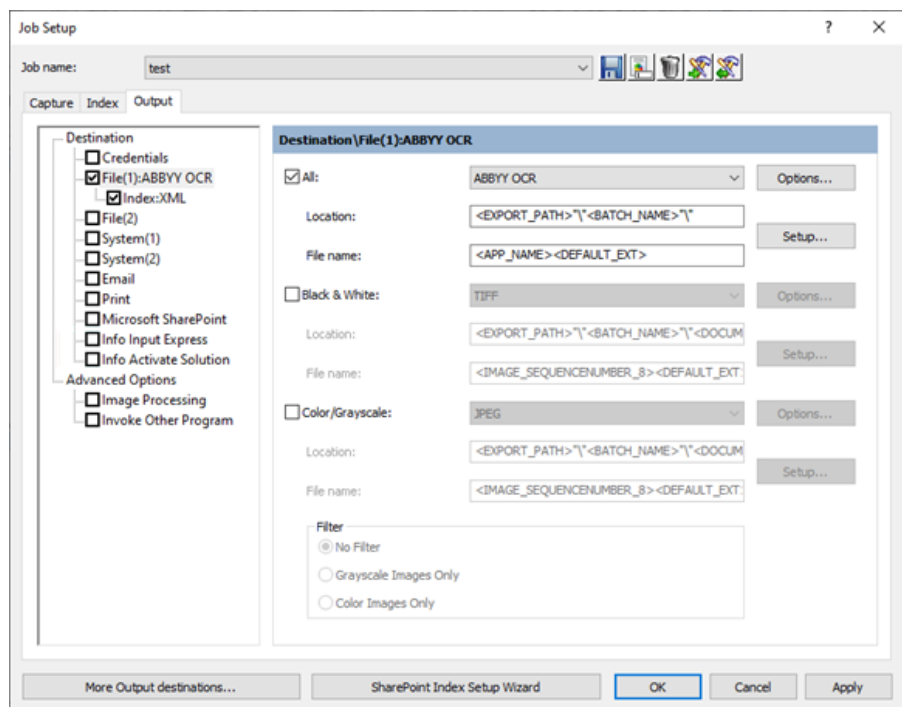
The credentials will always be used even if the current user has access to the network share.

The Credentials may be used for File (1), File (2), System (1) and System (2) output. The use of Credentials is especially useful when using the optional Capture Pro Network Edition - Remote Output Server. Because the Remote Output service has no user, the Credentials are used to provide access to external shares.

Destination options: File (1) and File (2)

File (1) option — select a file format (TIFF, PDF, JPEG, PNG, etc.) for your output. Your choice of formats will depend upon your type of output:

- **All** (black and white and color/grayscale)
- **Black and white**
- **Color/grayscale** — when this is selected, a Filter option may be selected to only output grayscale images or color images.



NOTE: For a description of the file format dialog boxes, see the section entitled, “Setup options for File (1) and File (2)” later in this chapter.

- **Location** — shows the output location for File (1). To change settings, click **Setup** to open the Location Setup dialog box. For more information about the Location Setup dialog box, see the section entitled, “Building location and filename formulas using the Location Setup dialog box” later in this chapter.
- **File Name** — shows the file name for File (1).

File (2) option — same as File (1). You can choose different settings for File (2) or use the same settings as in File (1).

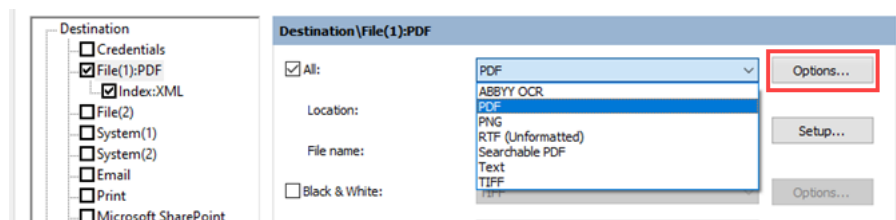
Under the **File (1)** or **File (2)** options, you can select the **Index** option. The following indexing options will be displayed.

- Batch Index file
- Document Index file
- Image Index file

Setup options for File (1) and File (2)

When you select a file format (i.e., TIFF, PDF, JPEG, PNG, etc.) for your output, your choice of formats will depend on how you configure the setup for that file format.

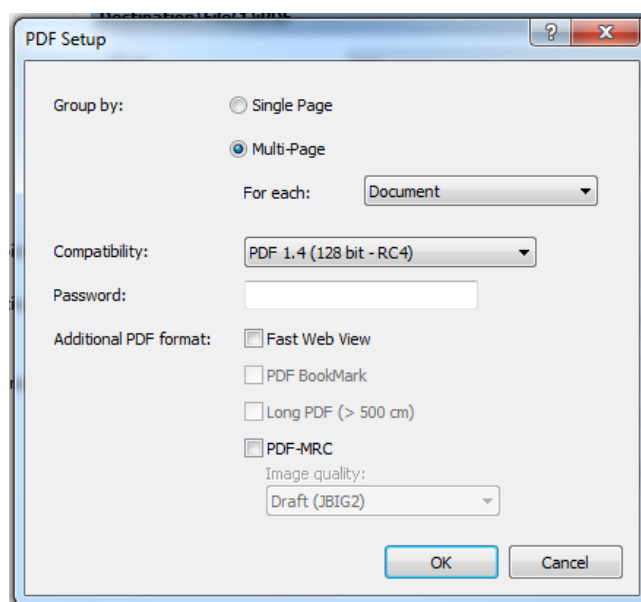
- Click **Options** for the file format you want to configure.



When the **Options** button is selected, a dialog box for the file format you selected will be displayed.

Selecting PDF as your file format

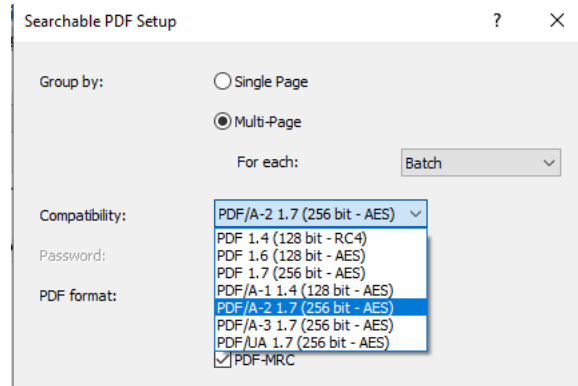
If you select **PDF** as your file format, the PDF Setup dialog box will be displayed.



1. Select either **Single Page** or **Multi-Page** as the way to group your image files in output. Every input (scanned) image file will be a separate output file.

- If you select **Single Page**, every image you scan is a separate image file in output. Therefore, if you scan a page, you will have two separate image files in output (one for the front and one for the back). If you are scanning dual stream, you will have four image files in output.
 - If you select **Multi-Page**, the *For each* drop-down list becomes available.
 - **For each: Page** — every image for every page scanned becomes one file. When you open the file, there will be two images, one for the front and one for the back. If you are scanning dual stream, you will have four images.
 - **For each: Document** — every page scanned into one document will become the contents of one file. There may be several (or many) images in one file.
 - **For each: Batch** — all images scanned into the batch will become one output file. There may be many images in the output file.
2. Select one or more **Additional PDF formats: Fast Web View, PDF BookMark, Long PDF or PDF-MRC**.
- Select **Fast Web View** if you want to configure the PDF file for faster viewing if the files are large and downloaded from the web site.
 - Select **PDF BookMark** when you want to bookmark each document in the PDF file. Group by **Multi-Page** for each **Batch** must be selected. Specify the value of each document bookmark using the **PDF BookMark** tab found on the **Index** tab. System and/or Index values may be used to produce unique bookmark values.
 - Select **Long PDF** if you expect your images to be longer than 500 cm (200 inches). This selection will impact performance. Long PDF is not available for PDF-MRC file format.
 - If you select **PDF-MRC** as one of your additional PDF formats, select the desired *Image quality*: **JBIG2/Group4, Draft, Good or Better**.
- NOTE: **PDF-MRC** options are available only if your initial Capture Pro installation was version 5.5.1 or earlier and may be used even after upgrading. If your initial Capture Pro installation was version 5.6 or higher, these options are not available.
- NOTE: In general, JBIG2 will produce smaller file sizes at lower quality than Group4. **JBIG2-Better, Group4-Draft, Group4-Good and Group4-Better** are lossless.
- If no selections are made, your PDF format will be **PDF**.
3. Select a PDF compatibility option if you require the PDF to be compatible with a specific version of Adobe Reader. If you are encrypting a PDF with a password, selecting a more recent version of PDF will provide a stronger encryption algorithm. PDF/UA is newly added for PDF and SPDF file

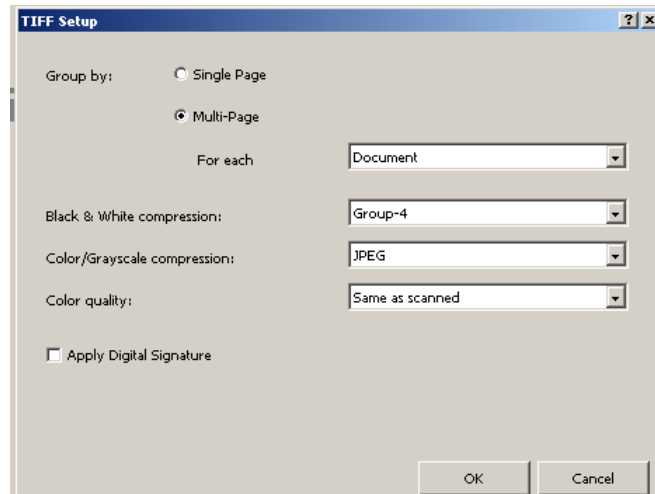
types.



4. If you want to encrypt the PDF file, enter a password that will be required to open and view the PDF file in the *Password* field. If you do not want to encrypt the file, leave the *Password* field blank.
5. When finished, click **OK**.

Selecting TIFF as your file format

If you select **TIFF** as your file format, the TIFF Setup dialog box will be displayed.



1. Select either **Single Page** or **Multi-Page** as the way to group your image files in output. Every input (scanned) image file will be a separate output file.
 - If you select **Single Page**, every image you scan is a separate image file in output. Therefore, if you scan a page, you will have two separate image files in output (one for the front and one for the back). If you are scanning dual stream, you will have four image files in output.
 - If you select **Multi-Page**, the *For each* drop-down list becomes available.
 - **For each: Page** — every image for every page scanned becomes one file. When you open the file, there will be two images, one for the front and one for the back. If you are scanning dual stream, you will have four images.
 - **For each: Document** — every page scanned into one document will become the contents of one file. There may be several (or many) images in one file.
 - **For each: Batch** — all images scanned into the batch will become one output file. There may be many images in the output file.
2. If your output includes black and white images, the Black & White compression option is available. Select **Group-4** or **(none)** from the drop-down list.
3. If your output includes color or grayscale images, the **Color/Grayscale compression** and **Color quality** options are available.
 - **Color/Grayscale compression:** select **JPEG**, **JAPED (TIFF 6)**, or **(none)**.
 - **Color quality:** select one of the following settings from the drop-down list: **Same as scanned**, **Draft**, **Good**, **Better**, **Best**, or **Superior**. **Same as scanned** is recommended.

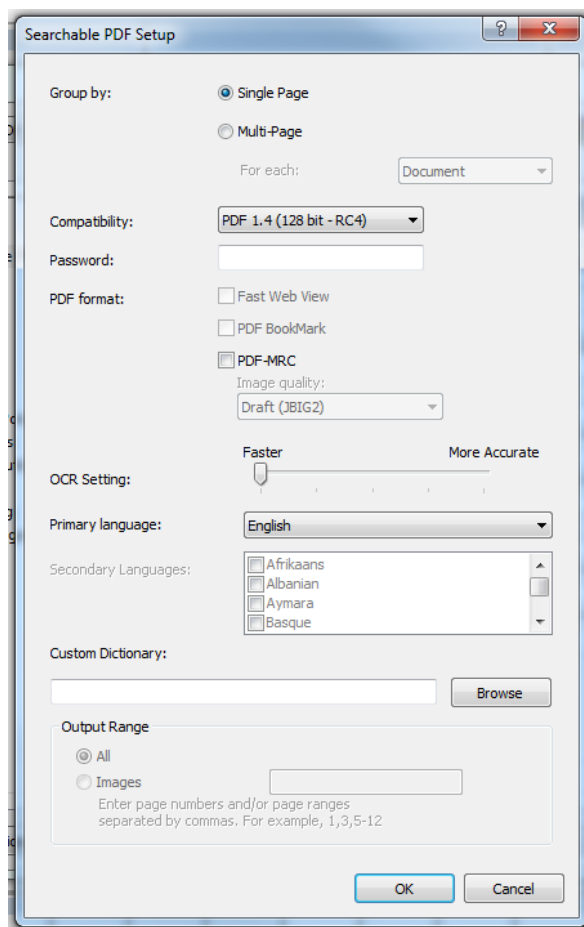
4. To verify that an image output by Capture Pro Software has remained unaltered from the source document image captured, click **Apply Digital Signature**.

The free Image Verifier software may be used to verify that a digitally signed image has not been altered at any time. To read about the benefits of image verification and to access the Image Verifier software, please contact your local *Kodak Alaris* representative.

5. When finished, click **OK**.

Selecting Searchable PDF as your file format

If you select **Searchable PDF** as your file format, the Searchable PDF Setup dialog box will be displayed.



1. Select either **Single Page** or **Multi-page** as the way to group your image files in output. Every input (scanned) image file will be a separate output file.
 - If you select **Single Page**, every image you scan is a separate image file in output. Therefore, if you scan a page, you will have two separate image files in output (one for the front and one for the back). If you are scanning dual stream, you will have four image files in output.

- If you select **Multi-page**, the *For each* drop-down list becomes available.
 - **For each: Page** — every image for every page scanned becomes one file. When you open the file, there will be two images, one for the front and one for the back. If you are scanning dual stream, you will have four images.
 - **For each: Document** — every page scanned into one document will become the contents of one file. There may be several (or many) images in one file.
 - **For each: Batch** — all images scanned into the batch will become one output file. There may be many images in the output file.

NOTE: Multi-page searchable PDFs are limited to 500 pages per document. Actual results may vary based on configuration and job setup.

2. Select one or more **PDF formats: Fast Web View, PDF BookMark or PDF-MRC.**

- Select **Fast Web View** if you want to configure the PDF file for faster viewing if the files are large and downloaded from the web site.
- Select **PDF BookMark** when you want to bookmark each document in the PDF file. Group by **Multi-Page** for each **Batch** must be selected. Specify the value of each document bookmark using the **PDF BookMark** tab found on the **Index** tab. System and/or Index values may be used to produce unique bookmark values.
- If you select **PDF-MRC** as one of your additional PDF formats, select the desired *Image quality*: **JBIG2/Group4, Draft, Good or Better**.

NOTE: In general, JBIG2 will produce smaller file sizes at lower quality than Group4. **JBIG2-Better, Group4-Draft, Group4-Good and Group4-Better** are lossless.

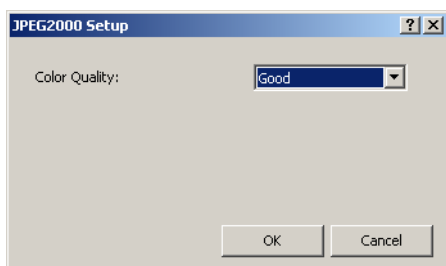
- If no selections are made, your PDF format will be **PDF**.

3. Select a PDF compatibility option if you require the PDF to be compatible with a specific version of Adobe Reader. If you are encrypting a PDF with a password, selecting a more recent version of PDF will provide a stronger encryption algorithm.
4. If you want to encrypt the PDF file, enter a password that will be required to open and view the PDF file in the *Password* field.
 - If you do not want to encrypt the file, leave the *Password* field blank.
5. Select the **OCR Setting** to balance your speed vs. accuracy needs. As you move the slider to the right, additional tools, such as language dictionaries and multiple OCR engines are used to improve accuracy.
6. When available, OCR will be performed to allow searching for specific text in output files, Select the OCR language that your scanned documents will contain for the most accurate character recognition. If you have a mixed document set that may contain multiple languages, you can select one or more secondary languages.
7. A custom dictionary may be used to improve the accuracy of recognizing unique or unusual words that appear in your document set. Click **Browse** to select a custom dictionary. See Appendix D, *Using Custom Dictionaries* for more information.

8. When grouping by multi-page, select either **All** or **Images** as a way to select specific images to be included in the output file.
 - If you select **All**, all images in the Page, Document and Batch group selected will be in the output file.
 - If you select **Images**, only the specified images in the Page, Document or Batch group selected will be in the output file. For example, if you selected **Multi-Page**, group by **Document** and specified an Output Range of 1, 10, then only the first and tenth image in each document will be in the output file. If a document contains less than 10 images, only the first image will appear in the output file.
9. When finished, click **OK**.

Selecting JPEG or JPEG2000 as your file format (if your output type is Color/Grayscale)

If you select **JPEG2000** as your file format, the JPEG2000 Setup dialog box will be displayed.



1. Select **Good**, **Better** or **Best** color quality.

NOTE: If you select **JPEG** as your file format, the additional color quality options are available: **Same as scanned**, **Draft** and **Superior**. **Same as scanned** is recommended.

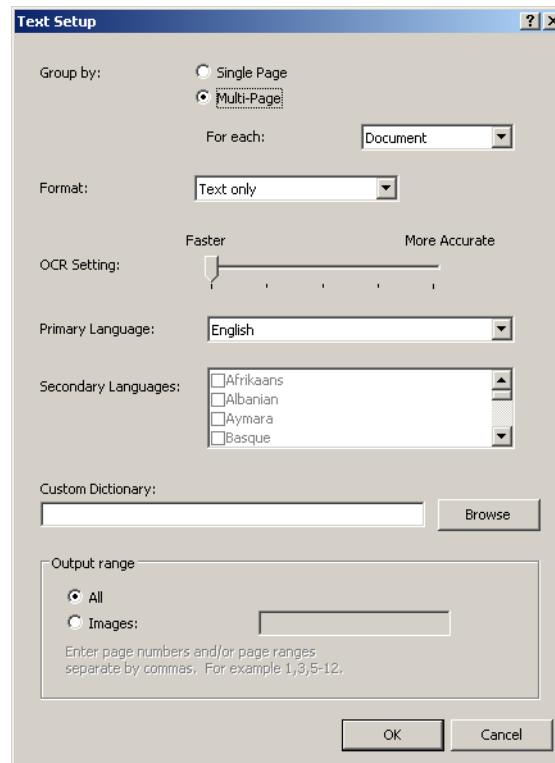
2. When finished, click **OK**.

Selecting PNG as your file format

No setup is required when selecting PNG as your file format. The PNG file format is a lossless, single-page format requiring no configuration.

Selecting Text as your file format

If you select **Text** as your file format to process your output, the Text Setup dialog box will be displayed.

The image shows a 'Text Setup' dialog box with a title bar containing a question mark and a close button. The dialog is organized into several sections. The 'Group by:' section has two radio buttons: 'Single Page' and 'Multi-Page', with 'Multi-Page' selected. Below this is a 'For each:' dropdown menu currently set to 'Document'. The 'Format:' section has a dropdown menu set to 'Text only'. The 'OCR Setting:' section features a slider between 'Faster' and 'More Accurate', positioned towards the 'Faster' end. The 'Primary Language:' section has a dropdown menu set to 'English'. The 'Secondary Languages:' section is a list box containing 'Afrikaans', 'Albanian', 'Aymara', and 'Basque', all of which are unchecked. Below this is a 'Custom Dictionary:' section with a text input field and a 'Browse' button. The 'Output range' section has two radio buttons: 'All' (selected) and 'Images:'. The 'Images:' option is followed by a text input field. A small text box below the 'Images:' field contains the instruction: 'Enter page numbers and/or page ranges separate by commas. For example 1,3,5-12.' At the bottom of the dialog are 'OK' and 'Cancel' buttons.

1. Select either **Single Page** or **Multi-Page** as the way to group your image files in output. Every input (scanned) image file will be a separate output file
 - If you select **Single Page**, every image you scan is a separate image file in output. Therefore, if you scan a page, you will have two separate image files in output (one for the front and one for the back). If you are scanning dual stream, you will have four image files in output.
 - If you select **Multi-Page**, the *For each* drop-down list becomes available.
 - **For each: Page** – every image for every page scanned becomes one file. When you open the file, there will be two images, one for the front and one for the back. If you are scanning dual stream, you will have four images.
 - **For each: Document** – every page scanned into one document will become the contents of one file. There may be several (or many) images in one file.
 - **For each: Batch** – all images scanned into the batch will become one output file. There may be many images in the output file.
2. Select one of the following formats from the drop-down list: **Text only**, **Formatted text**, **Text only – Unicode** or **Formatted text - Unicode**.
3. Select an **OCR Setting** to balance your speed verses accuracy needs. As you move the slider to the right, additional tools such as language dictionaries and multiple OCR engines are used to improve accuracy.

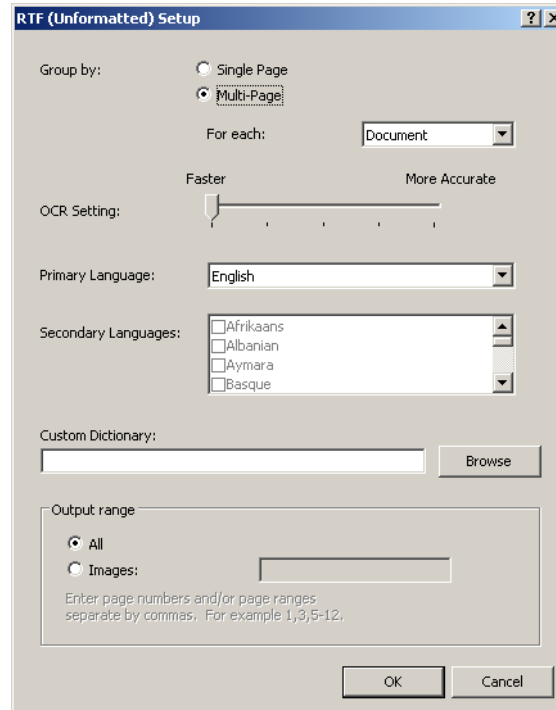
4. When available, OCR will be performed to allow searching for specific text in output files. Select the OCR language that your scanned documents will contain, for the most accurate character recognition. If you have a mixed document set that may contain multiple languages, you may select one or more secondary languages.
5. A custom dictionary may be used to improve the accuracy of recognizing unique or unusual words that appear in your document set. Click **Browse** to select a custom dictionary. See Appendix D, *Using Custom Dictionaries* for more information.

When grouping by multi-page, select either **All** or **Images** as a way to select specific images to be included in the output file.

- If you select **All**, all images in the Page, Document and Batch group selected will be in the output file.
 - If you select **Images**, only the specified images in the Page, Document or Batch group selected will be in the output file. For example, if you selected **Multi-Page**, group by **Document** and specified an Output Range of 1, 10, then only the first and tenth image in each document will be in the output file. If a document contains less than 10 images, only the first image will appear in the output file.
6. When finished, click **OK**.

Selecting RTF (Unformatted) as your file format

If you select RTF (Unformatted) as your file format, the RTF (Unformatted) Setup dialog box will be displayed.

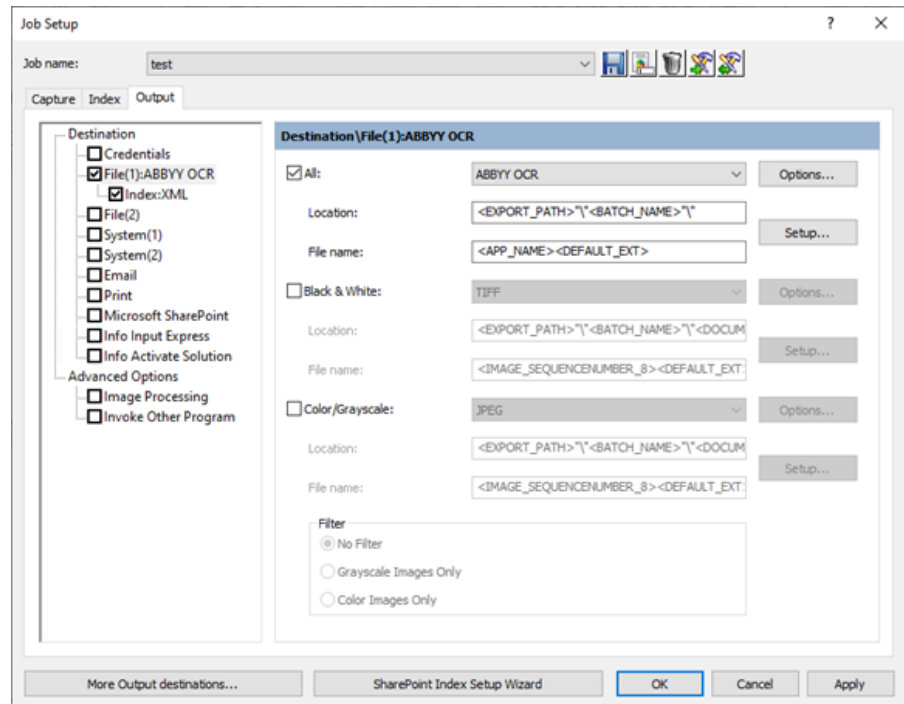


1. Select either **Single Page** or **Multi-Page** as the way to group your image files in output. Every input (scanned) image file will be a separate output file.
 - If you select **Single Page**, every image you scan is a separate image file in output. Therefore, if you scan a page, you will have two separate image file in output (one for the front and one for the back). If you are scanning dual stream, you will have four image files in output.
 - If you select **Multi-Page**, the *For each* drop-down list becomes available.
 - **For each: Page** – every image for every page scanned becomes one file. When you open the file, there will be two images, one for the front and one for the back. If you are scanning dual stream, you will have four images.
 - **For each: Document** – every page scanned into one document will become the contents of one file. There may be several (or many) images in one file.
 - **For each: Batch** – all images scanned into the batch will become one output file. There may be many images in the output file.
2. Select an **OCR Setting** to balance your speed verses accuracy needs. As you move the selector to the right, additional tools such as language dictionaries and multiple OCR engines are used to improve accuracy.

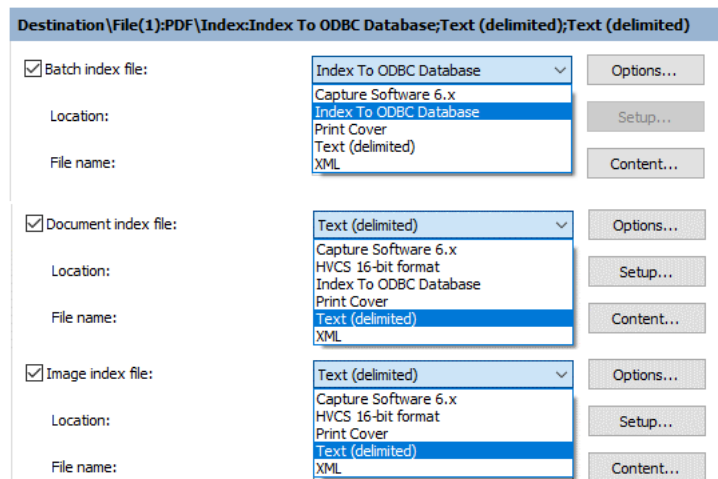
3. When available, OCR will be performed to allow searching for specific text in output files. Select the OCR language that your scanned documents will contain, for the most accurate character recognition. If you have a mixed document set that may contain multiple languages, you may select one or more secondary languages.
4. When grouping by multi-page, select either **All** or **Images** as a way to select specific images to be included in the output file.
 - If you select **All**, all images in the Page, Document and Batch group selected will be in the output file.
 - If you select **Images**, only the specified images in the Page, Document or Batch group selected will be in the output file. For example, if you selected **Multi-Page**, group by **Document** and specified an Output Range of 1, 10, then only the first and tenth image in each document will be in the output file. If a document contains less than 10 images, only the first image will appear in the output file.
5. When finished, click **OK**.

Index options for File (1) and File (2)

Index options for the File (1) and File (2) output destinations are setup via the Output tab.



You can create a **Batch Index file**, a **Document Index file** and an **Image Index file**.



NOTE: If you only want to output an index file with no image file output, select the index file type (Batch, Document, Image), then select the destinations (File(1), File(2)) and uncheck all output types (All, Black & White, Color/Grayscale). The File(1)/File(2) label will change to **No images** to indicate that only the index data will be output.

Each index file (e.g., Batch, Document and Image) provides an **Options** button, a **Setup** button and a **Content** button.

Options — displays the available index file type:

- **Capture Software 6.x** — no property setup is required.
- **Index to ODBC Database** — sends selected batch and/or document index statistics to an ODBC compliant database.

- **Batch index file:** one database record per batch containing selected batch statistics.
- **Document index file:** one database record per document containing selected document statistics.

NOTE: This option is not available for Image index.

- **HVCS 16-bit Format** — *this option is not available for a Batch index file.* HVCS 16-bit Format allows you to define the *Client number* (1-999) and *Application number* (1-9).
- **Text (delimited)** — allows you to select an **ASCII** or **Unicode** text file format.
- **XML** — no property setup is required.
- **Print Cover** — adds a cover sheet to the file content when printed.

Setup — displays the Location Setup dialog box which allows you to create an index file. For more information about this dialog box, see the section entitled, “Building location and filename formulas using the Location Setup dialog box” later in this chapter.

Content — displays the Index Content Setup dialog box which allows you to define the index content. For more information about this dialog box, see the section entitled, “Using the Index Content Setup dialog box” later in this chapter.

Index to ODBC Database

Use this System Output Destination if you want to save your index data to an ODBC-compliant data source such as SQL Server and Microsoft Access. On output, selected batch and document index fields will be used to create a new record for each document and will be written to the database.

Three additional document index fields that contain the path to where the document images were stored are provided. If you are storing all images to a single location, then the *Image Location – All* field will contain the path of the images for each document. If you are storing black and white and color / gray scale images to different locations, then the *Image Location – Black & White* and *Image Location – Color/Grayscale* fields will contain the path for the respective image types. These fields may be used in your database to associate the stored image to the document index data.

Supported Output files/Grouping — multi-page, by document, all image types.

Supported Channels — All, Black and White, Color/Grayscale.

1. Access the **ODBC Database** system output destination.

NOTE: For Microsoft Access 2016 support, you must install the MS Access Database Engine 2010 Redistributable from the Microsoft web site: <https://www.microsoft.com/en-us/download/details.aspx?id=13255>

- **Data Source name:** browse to an existing or create a new File or Machine Data Source.
- **Database table:** select the drop-down control to display a list of available tables for the data source selected. Select the table where you wish to store the index field data.

2. Select the fields you want to populate.

You will notice that the left column of the data grid has been populated with your current batch and document index field names. There are also three additional document index fields: *Image Location – All*, *Image Location – Black & White* and *Image Location – Color/Grayscale*.

3. Select an index field that you want to map to the database table by clicking in the right column of the same row as the index field.
4. Click on the drop-down arrow to display a list of the available data table fields and select a field.
 - If you checked the **All** checkbox on the Output, System (1)/(2) tab, the field *Image Location – All* will contain the file path and image name. The file path will be made by appending the Output root path with “\batch name” and “\All”. The image name will be the document sequence number padded with zeros for a length of eight characters. The file extension will be determined by the image type you have selected for output (tif, pdf, txt, etc.). For example:
“C:\BatchesPro\Batch001\All\00000001.tif”.
 - If you checked Black & White, the “\All” in the file path will be replaced with “\BW”.
 - If you checked Color / Grayscale, the “\All” in the file path will be replaced with “\CG”.

Multiple records per document

A document may contain multiple items where each item will be saved as a separate record in the database. For example, the following document contains four items.

Description	Quantity	Price
Product Item 1	2	28.44
Product Item 2	1	43.12
Product Item 3	5	122.50
Product Item 4	2	12.80

If you want to save four records to the database where each record contains three fields, *Description*, *Quantity* and *Price*:

1. Create an index field for each database field that is to be populated. For example, *Description*, *Quantity* and *Price*. These index fields will be used to hold the data for the first item set.
2. Create index fields for the remaining item sets. The index field names must be the same as the first item set with a number appended. The numbers must start at 1 and be sequential. For example:

Product Item 2: "Description1", "Quantity1" and "Price1"

Product Item 3: "Description2", "Quantity2" and "Price2"

Product Item 4: "Description3", "Quantity3" and "Price3"

3. Use the Database Lookup Wizard to map the first item set index field names to the database field names. Only the first item set field names are used in the Database Lookup Wizard.

Database Lookup Wizard (Step 2 of 4)

How to do data lookup?

How do you want to do data lookup?

☐ Validate index fields from Lookup results

☒ Populate index fields from Lookup results

Select the index field and the table column to look up.

Lookup index field: And

Lookup table column:

Select the fields you want to populate.

ClientID	
LastName	
Description	Description
Quantity	Quantity
Price	Price

< Back Next > Cancel

Batch Index file

To set up a Batch Index file:

1. Select **Batch Index file**.
2. Select the desired index file type.
 - If you selected **Text (delimited)**, click **Options** and click either **ASCII** or **Unicode**, then click **OK**.
3. If desired, click **Setup** to display the Location Setup dialog box to create a path for your outputted batch index file. See the section entitled, “Building location and filename formulas using the Location Setup dialog box” later in this chapter.
4. If desired, click **Content** to display the Index Content Setup dialog box and define the index content. By default, the batch index file will contain only the batch indexes defined for this job. Use the **Content** button to add or remove index values or to reorder indexes in output. See the section entitled, “Using the Index Content Setup dialog box” later in this chapter.
5. When finished, click **OK**.

Document Index file

To set up a Document Index file:

1. Select **Document Index file**.
2. Select the desired index file type.
 - If you selected **Text (delimited)**, click **Options** and click either **ASCII** or **Unicode**, then click **OK**.
 - If you selected **HVCS 16-bit Format**, click **Options** and enter the **Client number** (1-999) and **Application number** (1-9), then click **OK**.
3. If desired, click **Setup** to display the Location Setup dialog box to create a path for your outputted document index file. See the section entitled, “Building location and filename formulas using the Location Setup dialog box” later in this chapter.
4. If desired, click **Content** to display the Index Content Setup dialog box and define the index content. By default, the document index file will contain only the document indexes defined for this job. Use the **Content** button to add or remove index values or to reorder indexes in output. See the section entitled, “Using the Index Content Setup dialog box” later in this chapter.
5. When finished, click **OK**.

Image Index file

To set up an Image Index file:

1. Select **Image Index file**.
2. Select the desired index file type.
 - If you selected **Text (delimited)**, click **Options** and click either **ASCII** or **Unicode**, then click **OK**.
 - If you selected **HVCS 16-bit Format**, click **Options** and enter the **Client number** (1-999) and **Application number** (1-9), then click **OK**.
3. If desired, click **Setup** to display the Location Setup dialog box to create a path for your outputted image index file. See the section entitled, “Building location and filename formulas using the Location Setup dialog box” later in this chapter.
4. If desired, click **Content** to display the Index Content Setup dialog box and define the index content. By default, the image index file will contain only the image indexes defined for this job. Use the **Content** button to add or remove index values or to reorder indexes in output. See the section entitled, “Using the Index Content Setup dialog box” later in this chapter.
5. When finished, click **OK**.

Building location and filename formulas using the Location Setup dialog box

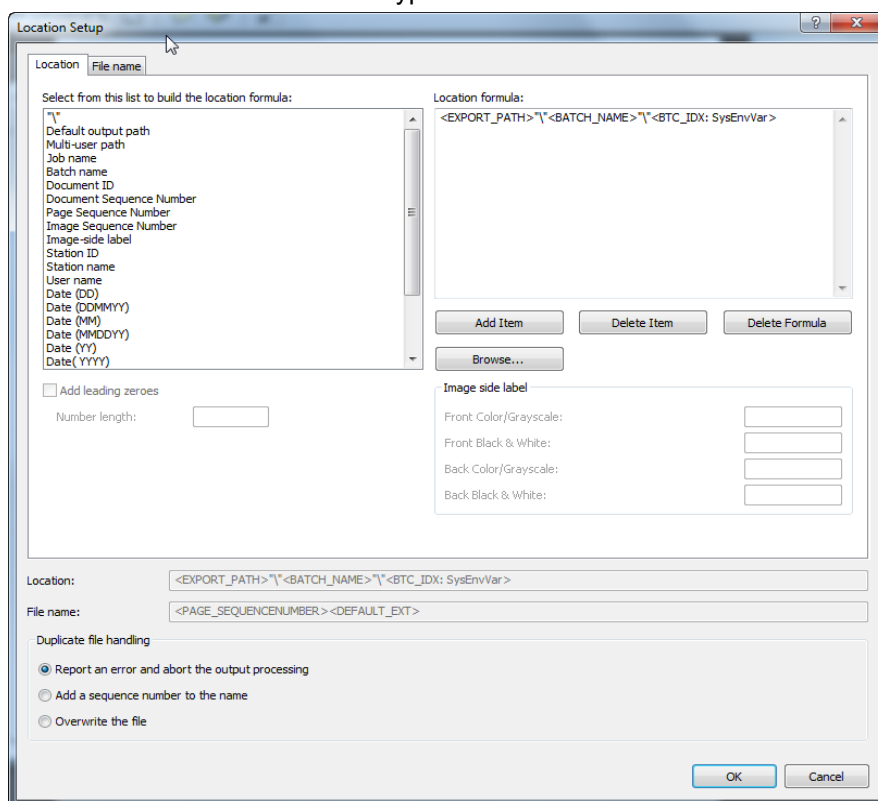
The Location Setup dialog box provides a listing of predefined values and your previously setup index values which allow you to store your output files in uniquely named folders that can be easily sorted.

When you click **Setup** on the Output tab - **Destination\File1** or **Destination\File2**, the Location Setup dialog box will be displayed. Use this dialog box to build a formula which Capture Pro Software will use when creating and storing output.

- To build location formulas, open the **Location** tab.
- To build file name formulas, open the **File name** tab (if it appears on this dialog box).

Procedures for creating Location formulas and File name formulas are the same.

NOTE: The options on the Location - Filename tabs are different depending on the type of index file (e.g., Batch, Document or Image). All options are not available with all types of index files.



1. Select a predefined value from the list on the left side of this dialog box. The formula currently in use is in the *Filename Formula* field on the right side of the dialog box.

2. Click **Add Item** to add the predefined value to the end of the formula. When specifying a path name, the limit is 248 characters in length.

NOTES:

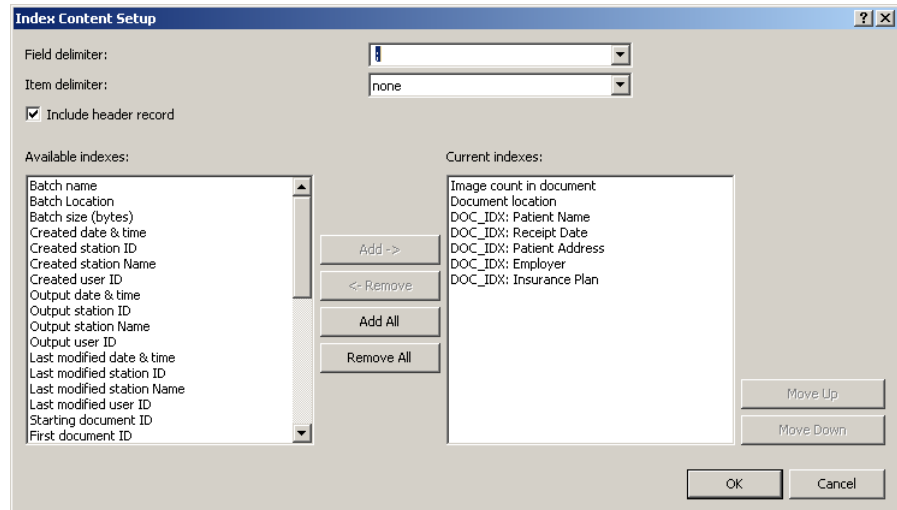
- Clicking **Delete Item** will delete the predefined value at the end of the formula.
 - Clicking **Delete formula** will delete the formula.
3. If you want to define digits of sequential numbers and add zeroes to the left side of your sequence number, check **Add leading zeroes**. This option is only available with number values.

4. If you checked **Add leading zeros**, use the **Number Length** box to indicate the number of digits (including any leading zeros) for the sequence number.
5. If you add **<Image-side label>** to the *Filename Formula* field, the Front Color/Grayscale, Front Black & White, Back Color/Grayscale, or Back Black & White text boxes become active. If desired, enter text labels in these fields.
6. The **Duplicate file handling** area provides two options. Select one of these options:
 - **Report an error and abort the output processing**: generates an error message and stops outputting the batch.
 - **Add a sequence number to the name**: appends a sequence number (e.g., -001, -002) and continues outputting the batch.
 - **Overwrite the file**: overwrites any existing files in the output folder(s) that have duplicate names. Existing files in the output folder(s) that are not overwritten will remain.
7. If you select **Page Sequence Number** or **Image Sequence Number** the **Reset Feature** is available. Set the sequence numbering behavior for page and/or image numbers.
 - Start at 1 for every batch (available only with Page Sequence Number and Image Sequence Number).
 - Start at 1 for every document (available only with Image Sequence Number).
 - Continuous image numbering from (available only with Image Sequence Number).
8. Click **OK** to save your output formula.

NOTE: Multi-page formulas: if you selected multi-page output for **TIFF**, **PDF** or **Searchable PDF**, you cannot add a Page Sequence Number, Image Sequence Number or Image-side label into the Location formula or File name formula. Similarly, if you choose multi-page output at the batch level, you cannot name the output file with any more detailed information than batch-level information.

Using the Index Content Setup dialog box

1. Click **Content** to define index content for the output index file. The Index Content Setup dialog box will be displayed.

The dialog box is titled "Index Content Setup". It has a "Field delimiter:" dropdown set to a pipe character "|". The "Item delimiter:" dropdown is set to "none". There is a checked checkbox for "Include header record". Below these are two lists: "Available indexes:" and "Current indexes:". The "Available indexes:" list contains 18 items: Batch name, Batch Location, Batch size (bytes), Created date & time, Created station ID, Created station Name, Created user ID, Output date & time, Output station ID, Output station Name, Output user ID, Last modified date & time, Last modified station ID, Last modified station Name, Last modified user ID, Starting document ID, and First document ID. The "Current indexes:" list contains 6 items: Image count in document, Document location, DOC_IDX: Patient Name, DOC_IDX: Receipt Date, DOC_IDX: Patient Address, and DOC_IDX: Employer. Between the lists are buttons: "Add ->", "<- Remove", "Add All", and "Remove All". To the right of the "Current indexes:" list are "Move Up" and "Move Down" buttons. At the bottom right are "OK" and "Cancel" buttons.

If you are defining index content for the Text (delimited) index type only, select an entry in the following fields:

The following options only apply to the Text (delimited) index type:

2. Select **(tab)** or **(space)** from the *Field delimiter* drop-down list. You can also manually input other characters as the custom delimiter.
3. Select **(none)**, **single quote (')** or **double quote (")** from the *Item delimiter* drop-down list.
4. Check the **Include header record** option if you want to include image file header information in the output index file.

If you are defining index content for the Text (delimited) index type and XML index type, you can apply the following option:

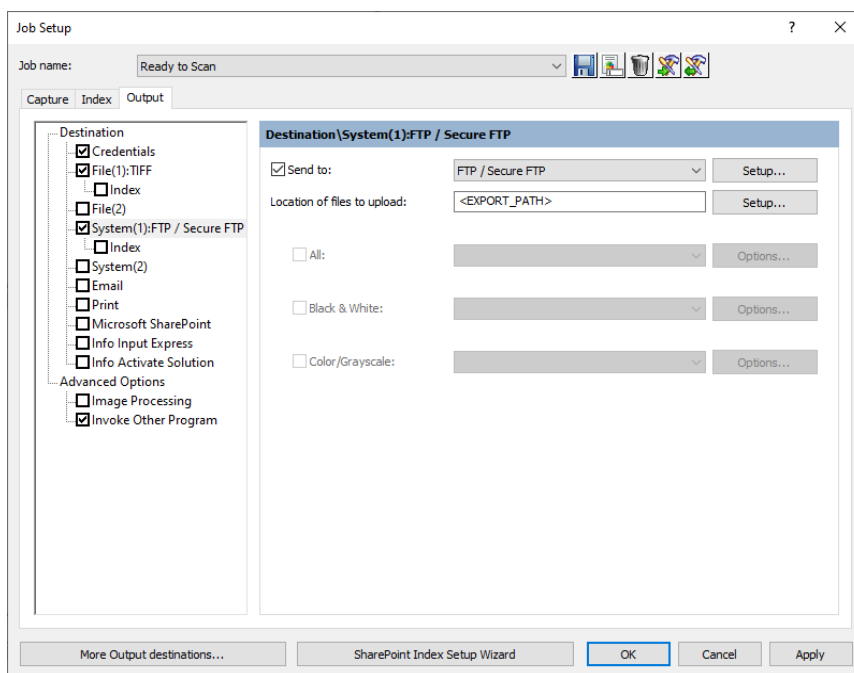
5. Select any item from the *Available Indexes* list and click **Add** to add it into the *Current Indexes* list.

NOTES:

- Click **Remove** to delete the selected index item from the *Current Indexes* list.
 - Click **Add All** to move all the index items from the *Available Indexes* list to the *Current Indexes* list.
 - Click **Remove All** to delete all the index items from the *Current Indexes* list.
 - Click **Move Up/Move Down** to move the selected index item one position up/down in the *Current indexes* list.
6. When finished, click **OK**.

System (1) and System (2) options

The System (1) and System (2) options allow you to select a Batch Output plug-in to output a batch with the required file structure and file format for many popular Enterprise Content Management systems.



System (1) option — if selected, check the **Send to** checkbox and then select a system (System Output Destination) from the drop-down list.

To change the system settings, click **Setup** and a specific dialog box for the selected system output destination will be displayed. For additional information about these dialog boxes, see the *System Output Destinations* guide (A-61638).

To change the output root path, click **Setup** and the Location Setup dialog box will be displayed. For more information, see the section entitled, “Building location and filename formulas using the Location Setup dialog box” earlier in this chapter.

Select a file format (TIFF, PDF, JPEG, PNG, etc.) for your output. Your choice of a file format will depend upon the *Send to* output type you selected.

NOTE: The **All**, **Black & White** and **Color/Grayscale** options may not be available for the system output destination you selected. If that is the case, click the **Setup** button to select your setup options.

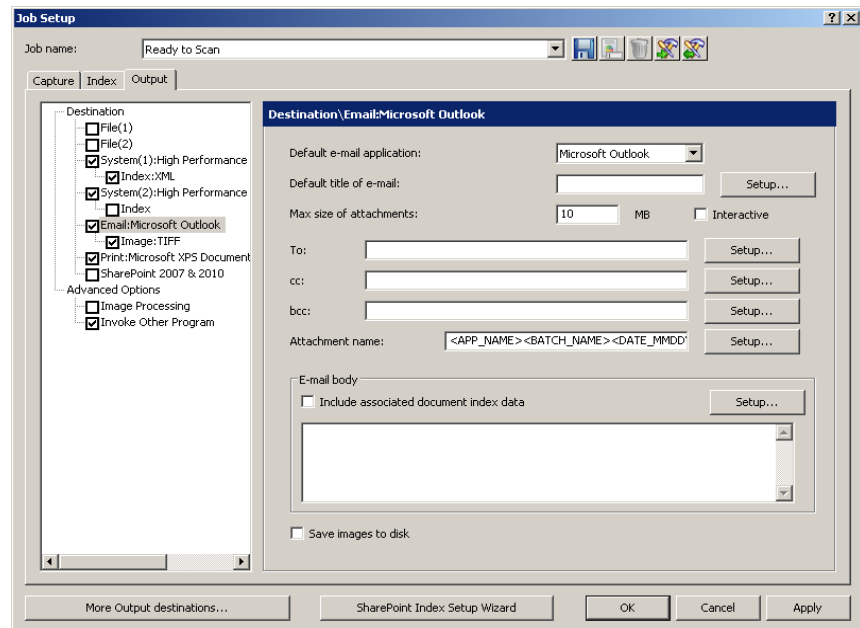
System (2) option — if selected, follow the same instructions as for System (1).

More Output Formats — provides a complete listing and links to *Kodak* Capture Pro and third-party system output destinations that are available from the *Kodak Alaris* website.

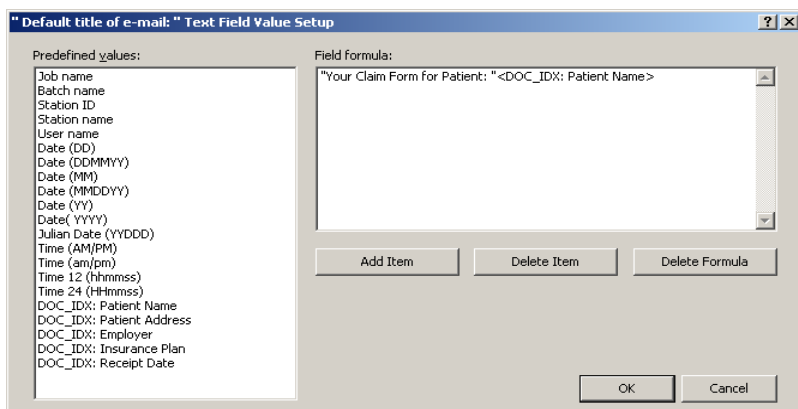
Setting up your e-mail options

The E-mail option on the Output tab allows you set up the software to automatically e-mail output batches, with or without index data.

1. Open the Job Setup dialog box and click the **Output** tab.
2. Click the **E-mail** option. The Destination\E-mail: dialog box will be displayed.



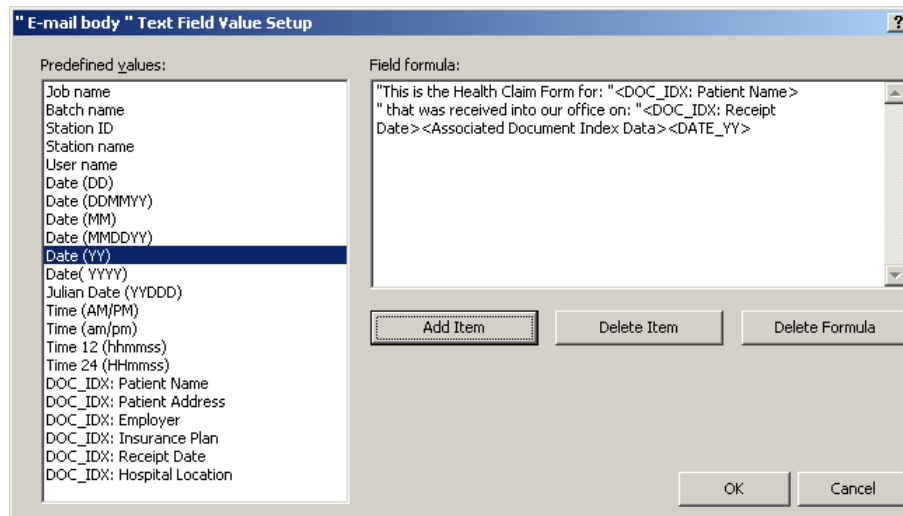
3. Select an e-mail software application to send e-mails from the *Default e-mail application* drop-down list.
4. Enter the information you want to appear as the subject line of the e-mail in the *Default title of e-mail* field. You can select a predefined value to this subject line (e.g., date, name, etc.) by clicking **Setup**. The Default Title of e-mail Text Field Value Setup dialog box will be displayed in which you can select additional items to add to the e-mail title.



- Select the values you want to add to the e-mail title from the *Predefined values* list. With each addition, click **Add Item**.
- Click **OK** when finished.

NOTE: If you want to delete the last value, click **Delete Item**. To delete the entire formula, click **Delete Formula**.

5. Enter the maximum size allowed for an e-mail attachment (in MB) in the *Max size of attachments* field.
 6. Check **Interactive** if you want a confirmation before the e-mail is sent.
- NOTE: If you are using older versions of Outlook Express as your e-mail client, you may need to check this option, otherwise the e-mail may not be sent.
7. Enter one or more e-mail addresses in the *To* field, *cc* field and *bcc* as applicable. The e-mail address(es) must be enclosed in double quotes (e.g., "John Smith@aol.com").
 8. If desired, click **Setup** to add predefined values to your e-mail recipient names.
 9. If you are including an attachment, you can enter a name of the attachment and/or select predefined values by clicking **Setup**. The attachment name must be enclosed in double quotes (e.g., "Patient file").
 10. Check **Include associated document index data** if you want data to automatically be displayed in the *E-mail body* field. To change this data, click **Setup** and the E-mail Body Text Field Value Setup dialog box will be displayed.



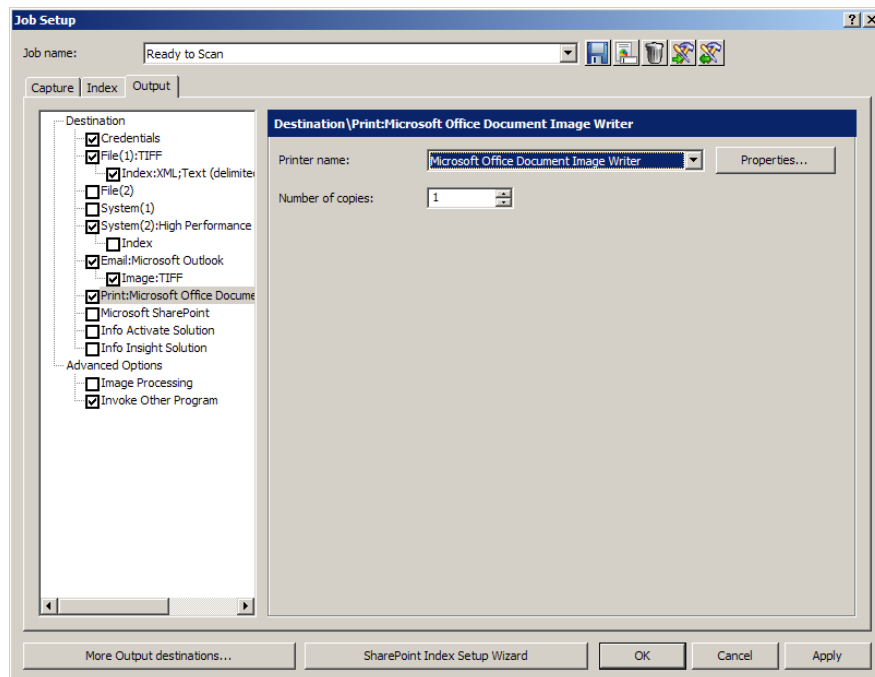
- Enter any text you want to appear in the e-mail. The information you enter must be enclosed in double quotes (" "). You can also select any values from the *Predefined values* list and click **Add Item**.
 - Click **OK** when finished.
11. Check **Save images to disk** if you want to save the output image files to your hard drive in addition to sending the email output.
 12. Click **OK** when finished.

NOTE: If you check **Image** under the E-mail option on the left side of the Output tab, you can check destination options (TIFF, PDF, JPEG, PNG, etc.) depending on your type of output.

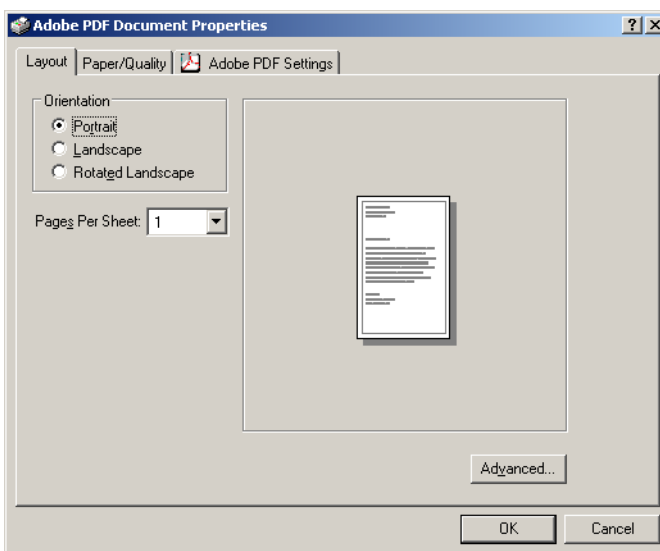
Setting up your Print options

The Print option allows you to print your output.

1. Click **Print** on the Job Setup - Output tab.



2. Select the desired printer from the *Printer name* drop-down box.
3. If you want to change the printer properties, click **Properties**. The properties for the selected printer will be displayed.



4. Change the printer properties as desired and click **OK**.
5. Select the number of copies you want to print from the drop-down list and click **OK**.

Using the SharePoint Index Setup wizard

Step 1: SharePoint setup: create, edit and select a SharePoint connection

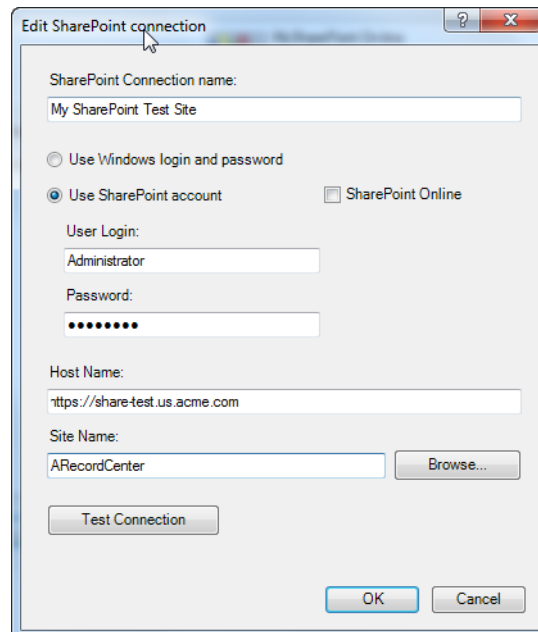
The SharePoint Index Setup provides a quick, easy way of configuring a Capture Pro Software job setup for use with your existing SharePoint site.

The setup wizard will guide you in connecting to your SharePoint site, creating index fields to populate SharePoint columns and defining storage paths for images.

The wizard is aware of SharePoint data types and will recommend index field formats to ensure properly formatted and 'in range' data capture. In the case of columns of type 'choice', the wizard will populate a drop-down list with the acceptable data values.

The SharePoint Index Setup wizard will guide you through four steps:

1. Select a connection to the SharePoint site where you want to place the batch images and data. A connection specifies the *Host name*, *Site name* and the *Credentials* required to access the site. You may provide a meaningful name to the connection for future use.



If no connections have been defined, the Create a SharePoint connection dialog box will be displayed.

1. Enter a **name** for the connection. You will use this name to refer to this specific SharePoint site.
2. Select **Use Windows login and password** if you will be accessing the SharePoint site with your Windows login ID and password.
3. Select **Use SharePoint account** and enter your *User Login* ID and *Password* to use your SharePoint account credentials to access the SharePoint site.
4. Enter the **Host name**. For example: https://my-SharePoint-host.
5. Enter the **Site name**. If the host name and credentials are correct, you can click **Browse** to select the available sites.

NOTES:

- Before browsing a SharePoint site, make sure you have permission to access all subsites. To check access, first browse to `//<server>/_vti_bin/Lists.aspx`. If errors are returned, verify the SharePoint setup and site permissions.
- To access an Office 365 SharePoint Online account, check **SharePoint Online**.
- To access an Office 365 SharePoint Online account you must first install the SharePoint Server 2013 Client components SDK and the Windows Identity Foundation. Both components are available at the Microsoft Download Center.
- To determine the Host Name, use a web browser to browse to your O365 site. In the browser *Address* bar make note of the URL. The host name is typically the first part of the URL and ends before `/_layouts/...`

Step 2. Creating document index fields based on your existing SharePoint columns

After selecting one of the available SharePoint lists found on your SharePoint site and selecting the *Document Type*, the SharePoint columns will be displayed.

SharePoint Index Setup

SharePoint List: Hold Reports Show Document Libraries only

Document Type: Document

SharePoint Column	Column Type	Required	Input Format	Default Value	Create Index	Status
Content Type	Computed	☐	?<0>		☐	
Name	File	☒	?<0>		☒	
Title	Text	☐	?<0>		☒	
Site URL	Text	☐	?<0>		☒	
Holds	Text	☐	?<0>		☒	
Hold Url	Text	☐	?<0>		☒	

Edit

Status Message
This selected SharePoint Column is of type Computed. An index field of this type can not automatically be configured.

< Back Next > Cancel

The *Column Type* will be shown and the **Required** checkbox will be checked if the column is required by your SharePoint list.

By default the **Create Index** checkbox will be checked for all column types that may be populated by the automatically created and configured index fields. If you do not want to populate a specific column or do not require a new Index field to populate a specific column, then uncheck the **Create Index** checkbox. If you want to create an index field for a SharePoint column that is not checked, check the **Create Index** check box and then click **Edit** to configure the index field. Later you can specify the data that will be stored in a column.

As an example of when to uncheck the **Create Index** checkbox imagine that the SharePoint column *Full Name* is to contain a persons name in the form 'last name, first name'. Two existing index fields, 'First Name' and 'Last Name', will be used to populate this column. The mapping of these two index fields will be done later, for now uncheck the **Create Index** checkbox for the 'Full Name' column as an index field 'Full Name' is not needed.

An *Input Format* will be recommended for each new index field based on the data requirements of the SharePoint column. You do need to change the recommended format unless you want to further restrict the data range or data type.

A *Default Value* will be shown if a default value has been specified in SharePoint for the column. You can change an existing value or add a default value if a value is not shown by selecting the drop-down list. A list of predefined values, including any defined bar code, OCR or mark detection zones will be displayed. If you require a more complex default value, select **Edit**. You can define the default value using one or more predefined tags or fixed strings.

The *Status* column will indicate if there are any issues in creating an index field. Selecting a row containing the indication will display a status message in the area below the **Edit** button. This symbol indicates that an index field will not be created for this SharePoint column. In most cases this is because the column type may not be automatically created by the application. For example the column type calculated requires references to other SharePoint columns that are not known by the application. You can create an index field for this column by checking **Create Index**.

Selecting a row containing the indication  will display a status message in the area below the **Edit** button. The status message will describe the problem and how it can be resolved. This symbol indicates that there is a problem creating the index field that must be resolved before continuing. You can uncheck the **Create Index** checkbox if the index field is not needed.

To add or edit other index field parameters such as *Output format*, *Substitute Characters* and *List* (for drop-down index fields), select the row for the appropriate index field and click **Edit**.

Step 3. SharePoint setup:
Selecting values to populate
SharePoint columns

Now that you have created index fields, you can use these index fields along with system values (Job name, Batch name, date, time, etc.), OCR, bar code mark detection zone values or combinations of these values to populate your SharePoint columns.

Required Columns	
Name	<DOC_IDX: Name>

Optional Columns	
Content Type	<DOC_IDX: Content Type>
Title	<DOC_IDX: Title>
Site URL	<DOC_IDX: Site URL>
Holds	<DOC_IDX: Holds>
Hold Uri	<DOC_IDX: Hold Uri>

Content Type

The SharePoint columns that require a value are shown at the top. By default the index field created in Step 2 is used to populate the column. To select a different value, select the *SharePoint* column and select the change control icon. You can select one or more items from the list, including fixed text strings enclosed in double quotes. For example "Created : "<DATE_DDMMYY>".

Any *SharePoint* column that was not included in Step 2 (**Create Index** checkbox not checked) will not show a default value. This is because no index field was created for this column. You can still define a value for this column using other index fields, system values, OCR, barcode or mark detection zone values or a combination of these values.

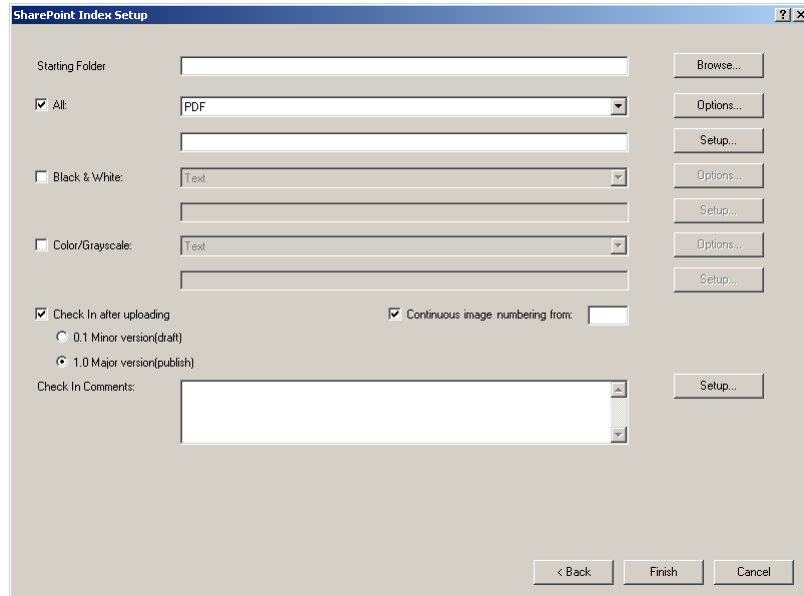
NOTE: The *SharePoint Name* column will define the name of the file stored in SharePoint. Step 4 describes how to group images.

If you group by **Multi-Page** for each document, then each document must have a unique name. For example *Name* can be <DOCUMENT_SEQUENCENUMBER>.

If you group by **Single page**, each image must have a unique name which means the *Name* column must contain a value that will be unique for each image. For example *Name* can be <IMAGE_SEQUENCENUMBER_DOCUMENT>.

Step 4. SharePoint setup: Defining storage options and paths

The last step is to specify the format of the images and where you want to store the images in SharePoint.

The image shows the 'SharePoint Index Setup' dialog box. It has a title bar with a question mark and close button. The main area contains several sections: 'Starting Folder' with a text box and a 'Browse...' button; a section with a checked 'All:' checkbox, a 'PDF' dropdown, and a text box, with 'Options...' and 'Setup...' buttons to the right; a section with an unchecked 'Black & White:' checkbox, a 'Text' dropdown, and a text box, with 'Options...' and 'Setup...' buttons to the right; a section with an unchecked 'Color/Grayscale:' checkbox, a 'Text' dropdown, and a text box, with 'Options...' and 'Setup...' buttons to the right; a section with a checked 'Check In after uploading' checkbox, two radio buttons for '0.1 Minor version(draft)' and '1.0 Major version(publish)', and a 'Continuous image numbering from:' text box; and a 'Check In Comments:' text box. At the bottom right are '< Back', 'Finish', and 'Cancel' buttons.

The *Starting Folder* is the path to an existing folder in the current SharePoint site. The image paths you specify for *All*, *Black & White* and *Color/Grayscale* will start at this folder. Select **Setup** to view the available folders.

If you have Black & White and Color/Grayscale images and all the images are to be stored at the same location using the same image format, select the **All** checkbox.

Select the file type (Text, TIFF, PDF, etc.) for your output. Select **Options** to configure the file format for the file type you selected. For a description of the file format dialog boxes see the section entitled, "Setup options for File (1) and File (2)" in Job Setup: Output tab later in this chapter.

You can specify a folder location for the image in the box below the file type. Select **Setup** to build the folder location from available system and field index values.

NOTE: The Setup buttons allow you to specify the path and folder name in which to store images (SharePoint documents). Each document must have a unique path and name or the document may be overwritten. If versioning is configured, a duplicate filename error may result. Verify that the SharePoint *Name* you choose in Step 3 is compatible with the path and image grouping selection.

If you only have Black & White or Color/Grayscale images or you want to have different file types for your Black & White and Color/Grayscale images, select the **Black & White** and **Color/Grayscale** checkboxes.

To check-in documents to a SharePoint document library that has versioning enabled, check the **Check in after uploading** checkbox. If your SharePoint list does not have versioning enabled, a warning will be displayed and the box unchecked. You can check-in documents with a major version number (1.0) or with a minor version number (0.1). If your SharePoint is not configured to allow minor version numbering, a warning will be displayed and the major version number selected.

NOTE: When SharePoint versioning is enabled, you may also need to configure SharePoint to **Require check out**.

When checking in, you can include a **Check In Comment**. The comment may be a fixed message or click **Setup** to build a comment using system and index values. For example: <STATION_NAME>" : " <USER_NAME>.

The predefined index **Image Sequence number (batch)** can start at a specific number by checking the **Continuous image numbering from** checkbox and providing a start value.

NOTES:

- Checking the **Continuous image number from** checkbox does not change the Image Sequence number (document) start value.
- Before starting the wizard it is recommended that you create any barcode OCR or mark detection zones that you want to include in the output to SharePoint.

Launch the SharePoint Index Setup wizard by:

- Selecting **File>Job Setup**, then select the **SharePoint Index Setup Wizard** button at the bottom of the Job Setup dialog box.

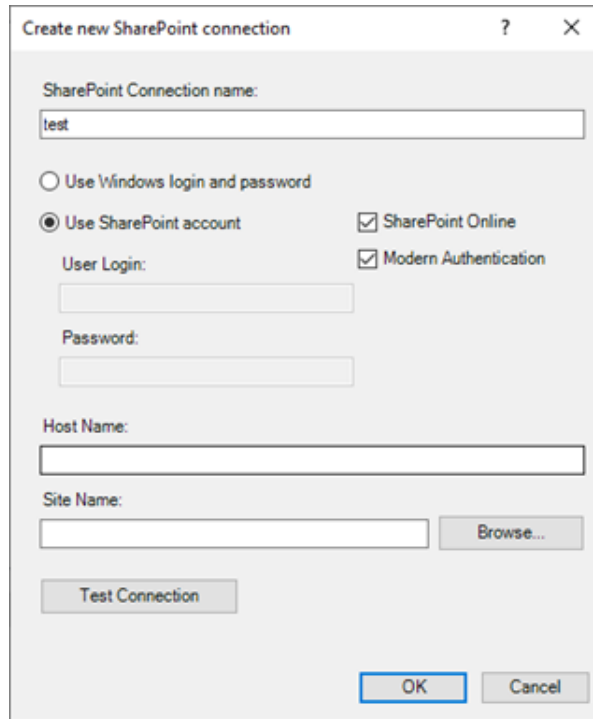
SharePoint Modern Authentication

This option allows you to enable Modern Authentication for SharePoint Online from the SharePoint Index Setup Wizard.

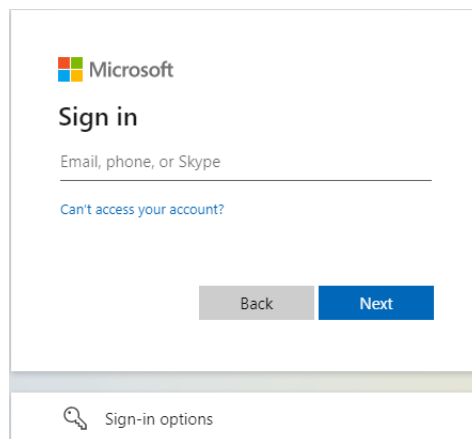
NOTE: This option is disabled when **Use Windows login and password** is checked.

To create a SharePoint Online connection:

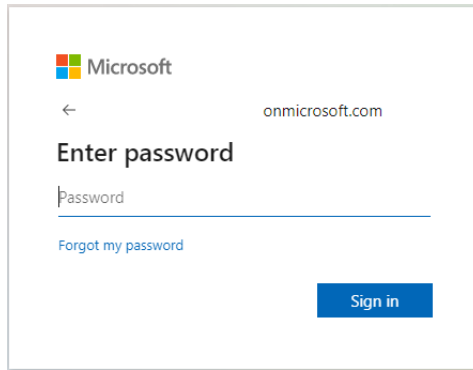
1. Click the radio button to activate **Use SharePoint account** and check the box for the **SharePoint Online** option.
2. Check the box for the **Modern Authentication** option, which initiates web-based two factor authentication to complete SharePoint Online setup.



3. In the login pop-up, enter your SharePoint Online account username.



4. After your username is confirmed as valid, enter your SharePoint Online password to complete first factor sign in.



Microsoft

← onmicrosoft.com

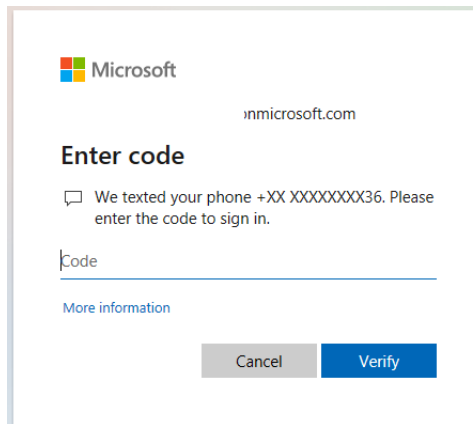
Enter password

Password

[Forgot my password](#)

Sign in

5. Enter the verification code from your telephone/mobile phone to complete second factor sign in.



Microsoft

onmicrosoft.com

Enter code

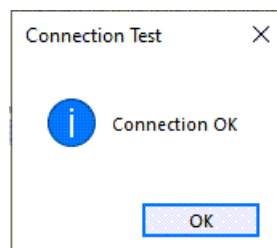
☐ We texted your phone +XX XXXXXXXX36. Please enter the code to sign in.

Code

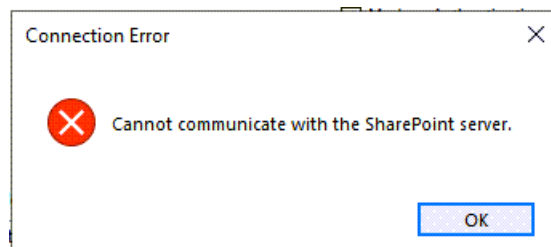
[More information](#)

Cancel **Verify**

6. Upon successful SharePoint Online login, a connection OK message is displayed when you click Test Connection.



If the login is unsuccessful, an error message is shown.



7. Following a completed SharePoint Online login, a pop-up window allows you to choose to stay signed into SharePoint by selecting **Yes** or to sign out after your session is finished by clicking **No**. If you choose **Yes**, the login pop-up is not displayed during future SharePoint connection

attempts.

NOTE: If you select batch output, the same two-factor authentication process is used to initiate connection and files are uploaded to your SharePoint Online site upon successful login.

Advanced options

When you select **Advanced Options** the following options are available:

Auto-Deletion — deletes a front or back image when the image size is lower than the values specified on the Auto-Deletion dialog box.

Auto-Orientation — analyzes the content of your documents and orients each document so it is right-reading.

Background Color Smoothing — using this option for documents or forms with a background color will help produce images with a uniform background color.

Image Edge Fill — fills unwanted black or white edges on an image, thus producing a cleaner image.

Image Stamping — stamps the image number on the front and/or back sides of each page.

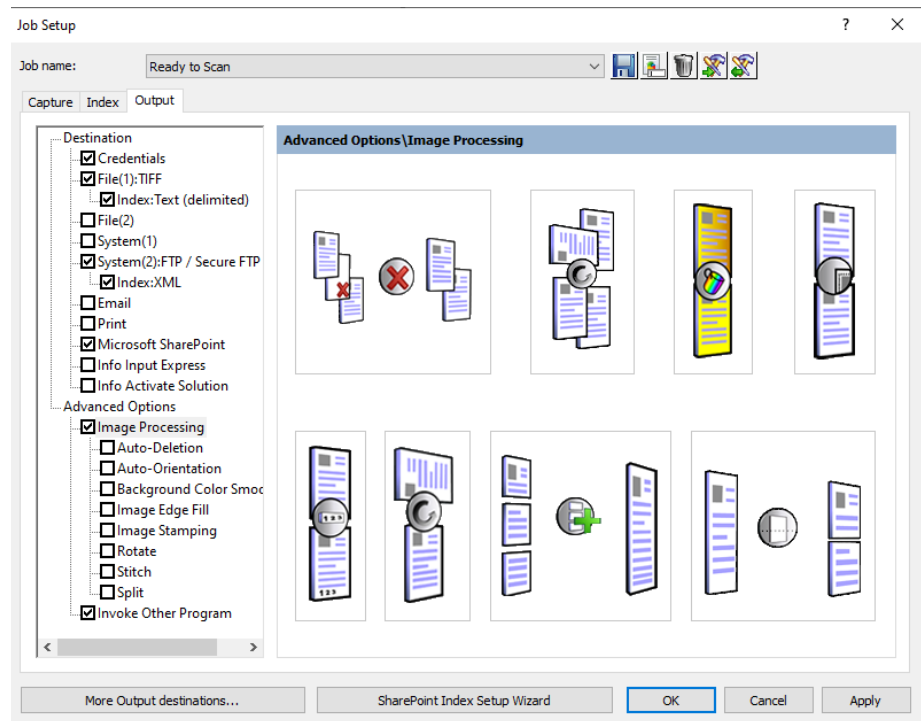
Rotate — rotates all images in a batch 0, 90, 180 or 270 degrees as selected.

Stitch — merges all images of a document into a single output file. Images must be the same width and all but the last image must be the same length.

Split — converts the front and back image into multiple images. Images must be the same type (color/grayscale or black and white).

To access the image processing options:

1. Click **Image Processing** under Advanced Options on the Output tab.



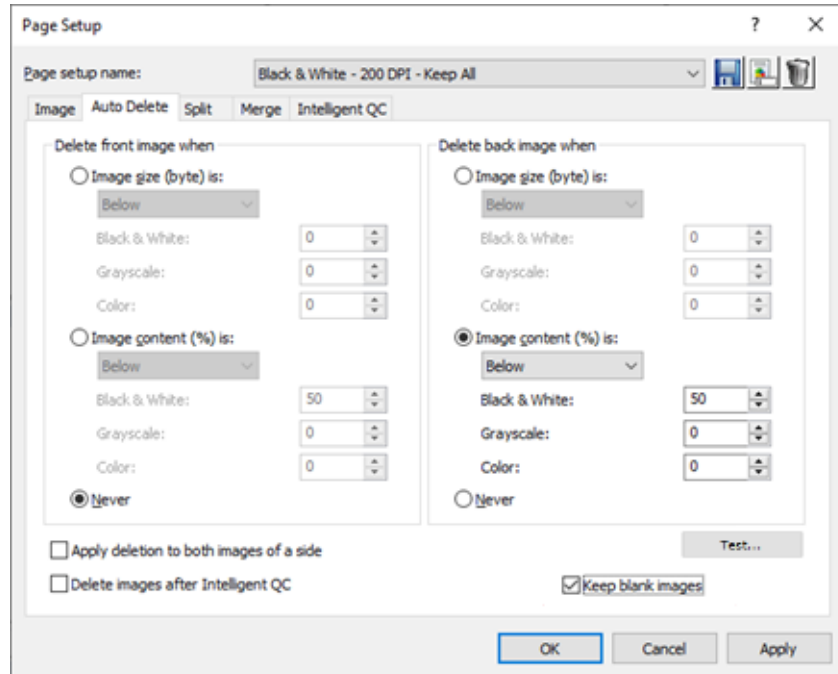
2. Select the desired image processing option and configure as desired.

NOTE: The sections that follow provide detailed information about each option.

Auto-Deletion

The Auto-Deletion option allows you to set options for automatically deleting an image with no content or very busy pages (e.g., the back of a form which has a lot of explanatory text on it). Auto deletion settings are specified independently for front and back images.

If you are scanning color, grayscale and/or black and white image types, auto deletion settings are also set independently. Therefore, you can choose to delete only the selected image type.



When using **Auto-Deletion**, it is recommended that you scan some representative documents which you consider to be *blank or almost blank*, by using the **Test** option. The results of the Test option will help you determine if you should set the auto delete values using the **Image size (byte) is** option or the **Image content (%) is** option.

- **Image size (byte) is Above** — select this option if you want to delete pages with a lot of busy, explanatory content on them. For example, if you are scanning documents with similar content (e.g. insurance forms) on the front and back page, and the front page has content you need to keep, but the back page contains instructions on how to file a claim (that you do not need to keep), enter the number of bytes that you want Capture Pro Software to delete any image file greater than that amount. Any image that is more than this value will be considered too large and will be deleted.
- **Image size (byte) is Below** — select this option if you want to delete pages with no content or very little content. Enter the number of bytes that Capture Pro Software will consider the image size to be blank. Any image that is less than this value will be considered blank and will be deleted.
- **Image content (%) is Above** — this option is similar to the **Image size (byte) is Above** option except that you enter a percentage value that Capture Pro Software will consider the image to have too much content. Any image more than this will be deleted.

- **Image content (%) is Below** — this option is similar to the **Image size (byte) Below option** except that you enter a percentage value that Capture Pro Software will consider the image to be blank or too little content. Any image that is less than this value will be considered blank and will be deleted. Use this setting when there are blank pages.

NOTES:

- When selecting the **Image size (byte)** option, other factors such as resolution, compression, etc., will impact the image size.
- The **Image content (%)** option only looks at the percentage of information on the image and therefore, is a more consistent and dependable option to use when images may vary in size, resolution, compression, etc.

Never — click **Never**, if you do not want to delete any images.

Keep blank images — when this option is enabled (checked), blank images are highlighted rather than deleted.

Images may be marked as blank either by clicking **Mark as blank** from the **Tools** menu

or by right-clicking selected images and choosing **Mark as blank**.

This option is active only when images are selected, and highlights marked images with a red border in the Image Viewer.

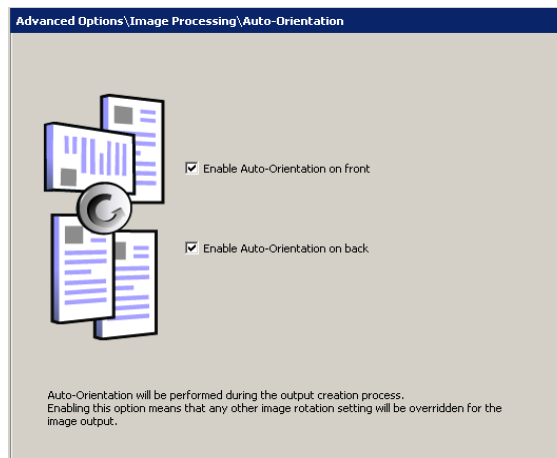
NOTES:

- Image index files are populated with the “<IMG_MARKBLANK>” tag when **Image marked as blank** is added to the **Current indexes:** column in the **Index Content Setup** dialog.
- <IMG_MARKBLANK> = 1 if an image is marked as blank, otherwise the value = 0.

Auto-orientation

This option analyzes the content of your documents and orients each document so it is right-reading.

Auto orientation does not work with all character sets. It is recommended that you scan some test documents to ensure the document will be oriented correctly.

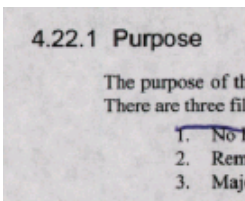


- You can select **Enable auto-orientation on front** or **Enable auto-orientation on back**.

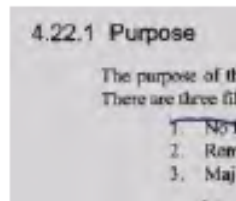
NOTE: Auto-orientation will be performed during the output creation process.

Background color smoothing

This option can be used for documents or forms with a background color to help produce images with a uniform background color.

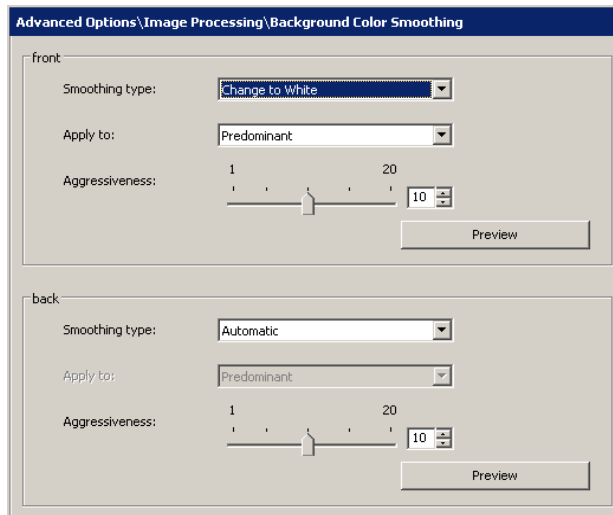


Before Background Color Smoothing



After Background Color Smoothing

The smoothing options can be applied to the front and/or back of a page.



You can select a smoothing type of:

None — no background smoothing will be performed; image will not be changed.

Automatic — the background color(s) will be selected and smoothed automatically.

Change to White — identifies up to three background colors and substitutes each one with white. If you select this option, the *Apply to* drop-down box will be available allowing you to select:

- **Predominant**: only the most common background color will be changed to white.
- **Neutral**: only the neutral background color(s) will be changed to white.
- **All**: the background color(s) will be changed to white.

Aggressiveness — controls the amount of variability that can be corrected in the background color(s). Select a value from 1 to 20.

Preview — opens the Background Color Smoothing Preview dialog box, which allows you to compare the original image against the changed image and alter your settings.

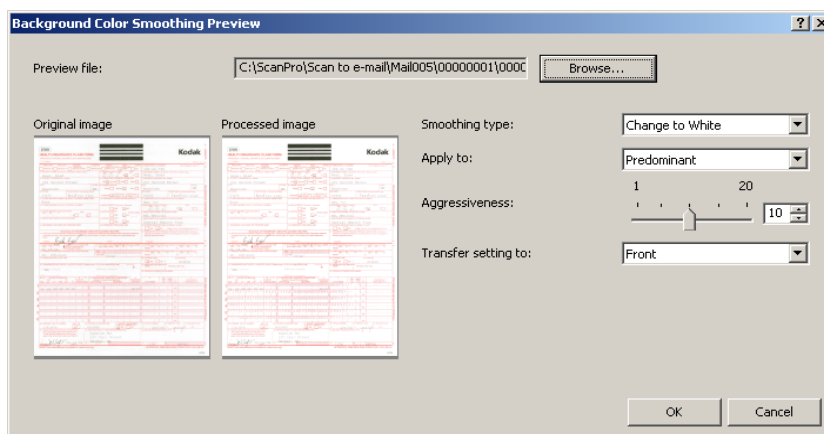
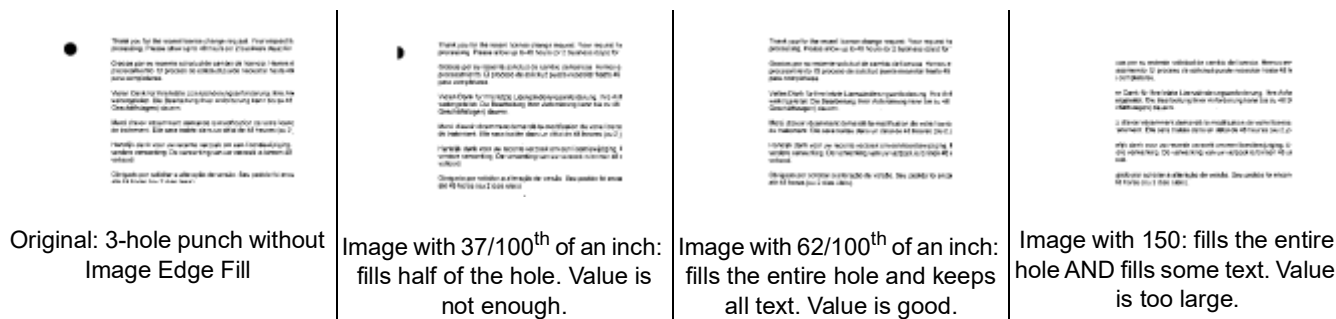


Image Edge Fill

This option allows you to fill and clean up the unwanted edges on a scanned image by covering the area in **Black** or **White** (as selected). This option can be applied to the front and/or back of an image.

You may want to use this option if you have pages with punch holes or ragged images that you want to clean up.

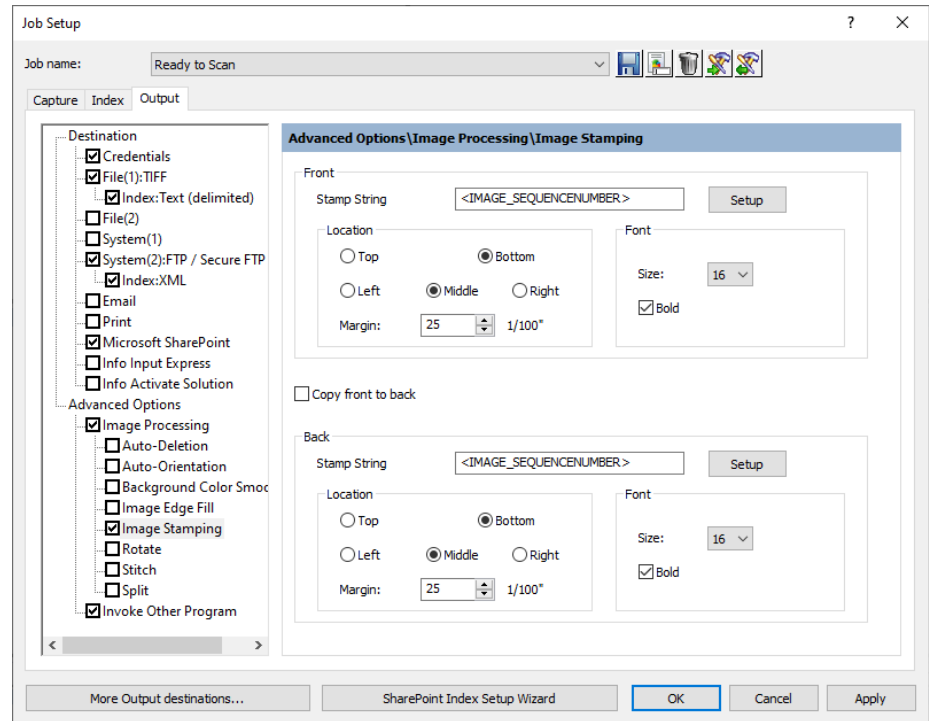


- Select a value in the **Top**, **Left/Right** and/or **Bottom** area(s) from each side of the scanned image to be filled in 1/100ths of an inch, or select **All sides match** to fill in the same amount on all sides.

NOTE: When using Image Edge Fill, be careful not to enter a value too large as it could fill in image data that you want to keep.

Image Stamping

Image stamping inserts information such as time, date, various sequence numbers and job or batch name into the scanned image. The Image Stamping dialog box allows you to place this information at various locations on the front and/or back of the page. The front and back of a page can be configured separately.



Front/Back: Stamp string — click **Setup** to display the Stamp String Setup dialog box. You can combine one or more items from the list to build a stamp string formula. For more information, see “Building location and filename formulas using the Location Setup dialog box” in the “Setup option for File (1) and File (2)” section earlier in this chapter.

Location: Top or Bottom — places the stamp on the top or bottom of the image as selected.

Location: Left, Middle or Right — places the stamp on the left, middle or right of the image as selected.

Margin — select a margin size in 1/100ths of an inch to indicate how far from the Top, Bottom, Left or Right margin you want the stamp to be placed.

Font size — select the font size of the stamp: **16** or **18** point.

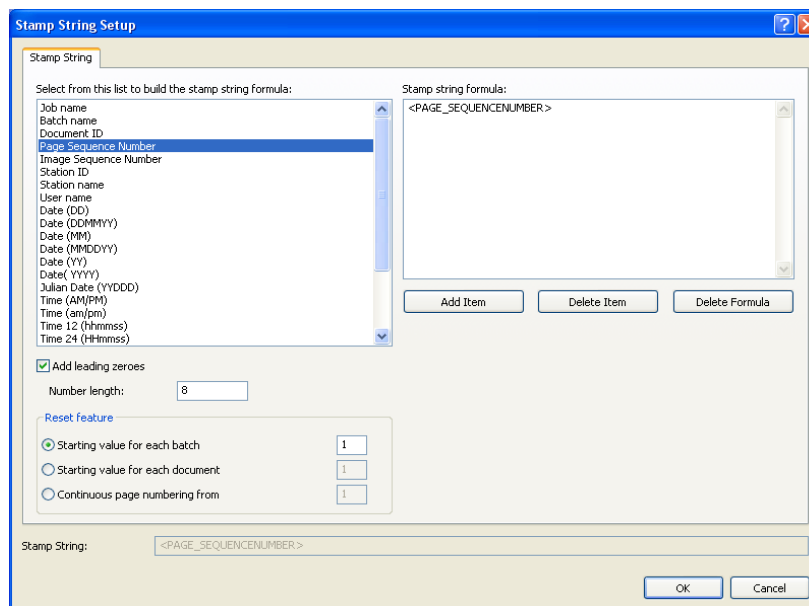
Bold — enable this checkbox for bold print.

Copy front to back — if you want the same setup values on the back as the values you set up on the front, enable this checkbox.

Setting up a stamp string

To setup an image stamp string, do the following:

1. Click **Setup** on either the **Front** or **Back** section. The Stamp String Setup dialog box will be displayed.



2. Select the items from the list of available Stamp String formulas that you want to include in your stamp string. For each item you select, click **Add Item**.

NOTES:

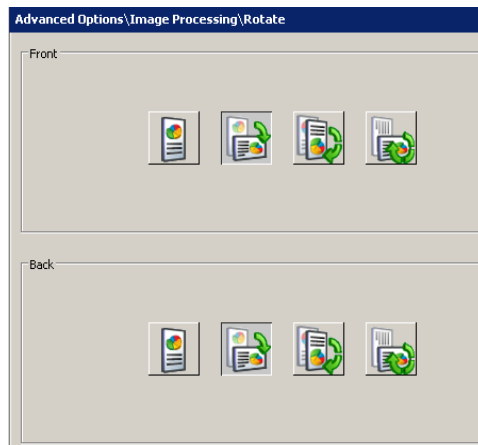
- The *Add leading zeros* and *Number length* fields become available when you select the following: **Document ID**, **Page Sequence Number**, **Image Sequence Number**, **Image Address Level 1**, **Image Address Level 2**, or **Image Address Level 3**. When selecting **Page Sequence Number** or **Image Sequence Number** you will also have the option to specify when the page or image sequence number should be reset and the value to which it should be reset.
 - To remove an item from the stamp string formula, click **Delete Item**.
 - To delete an entire formula from the stamp string formula, click **Delete Formula**.
3. When finished defining your stamp string, click **OK**.
 4. Define the location of the stamp string by specifying the placement of the image stamp on either side of the page. **Margin** defines the size of the border between the text and adjacent page edge(s), either from the right or left edge horizontally and top or bottom edge vertically. If **Middle** is selected, the margin is only applied to the vertical dimension.
 5. Select the desired font size: **16** or **18**.

6. If bold type is desired, click **Bold**.
7. Select **Copy front to back** if you want to duplicate the same stamp string specified on the front page on both sides, otherwise proceed to setup the back stamp string.
8. When finished, click **OK**.

NOTE: Capture Pro Software makes no attempt to fit text into the image stamping region. If an image stamp is larger than the allocated region, excess text will be truncated. Image stamp size is difficult to predict and depends on the complexity of the formula, font size, allocated margins and the string itself. It is recommended that a test scan(s) is performed to be sure that the specified string is not too large to fit into the stamping region.

Rotate

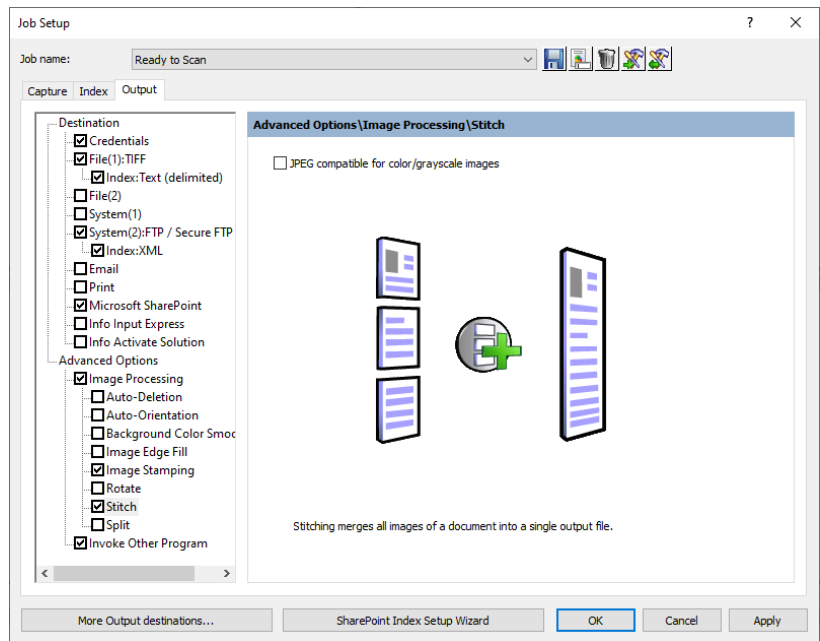
This option allows you to select the desired rotation of **0, 90, 180** or **270** degrees. The degree of rotation applies to all images in the batch.



Stitch

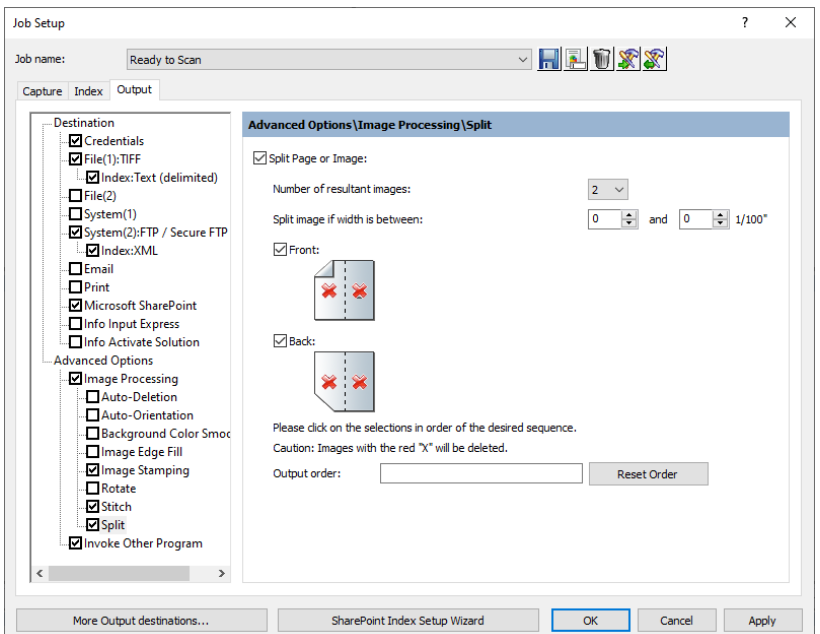
When this option is selected, all the images of the document will be merged into a single, continuous file.

NOTE: To use this effectively, all images must be the same width and length. A page setup can be used to alter the image width. All images except the last image must be the same length.



Split

When this option is selected, the front and rear image will be converted into multiple (up to 6) images. Images must be the same type (color/grayscale or black and white).

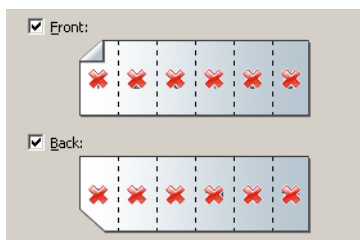


Split Page or Image — enable this checkbox to activate the Split option.

Number of resultant images — choose from 2 to 6 images that you want to split from the drop-down list.

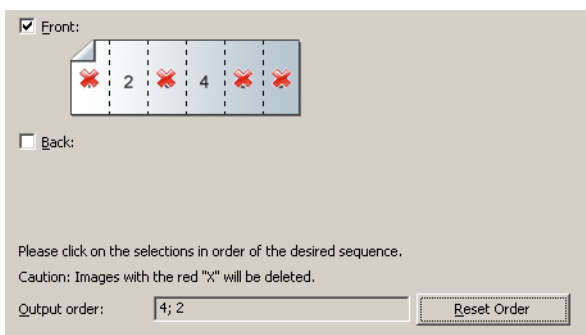
Split image if width is between — use the two drop-down lists to select a range of widths for the page or image. If the page width falls within this range, it will be split. If either the front or back side falls outside the range, neither side will be split.

Front and/or **Back** — enable this checkbox for **Front** and/or **Back** to activate the split. A graphic will be displayed showing your selection. For example, if you enable both checkboxes, the two book icons will appear with a red "X" on each page:



NOTE: When using a simplex-only scanner, only select **Front**. Selecting both **Front** and **Back** will result in no split.

Output order — the page order will be displayed in this field. Click on each image segment in the order you want the images to be output. As you click on an image segment, the red "X" disappears.

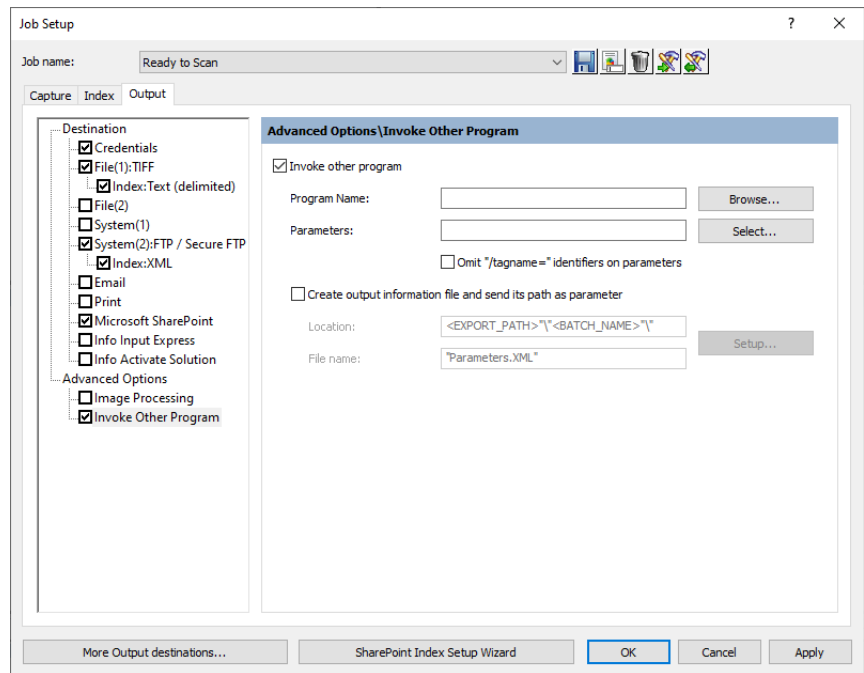


Any image segment that is still marked with a red "X" will be deleted and not sent to output. This option might be useful for the last page of a pamphlet that is always blank.

Reset Order — any order that you originally specified will be deleted and you can reorder your images.

Invoke Other Program option

The Invoke Other Program option on the Output tab allows you to use an application other than Capture Pro Software to make changes to your output. Select the checkbox to enable this option.



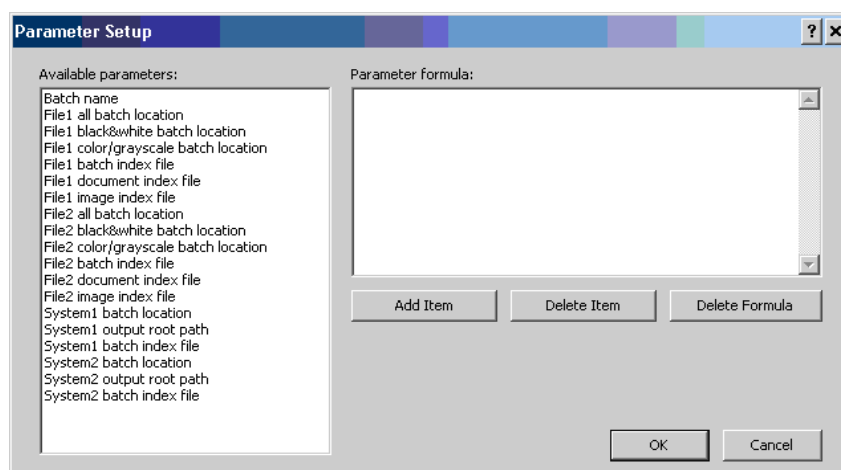
Program Name — enter the application name. If needed, click **Browse** to search for the application.

Parameters — parameters can be any combination of literal text strings and variable values which are determined at the time a batch is output. Variable values are defined by clicking **Select**.

Literal text strings can be typed into the *Parameters* text box or in the Parameter formula window of the Parameter Setup dialog box. Literal strings should be separated by spaces. Literal strings which include spaces should be enclosed in double quotes.

To add a variable parameter:

1. Click **Select** to display the Parameter Setup dialog box to setup variable parameters.



2. Select the parameter you want to add from the list of *Available parameters*.
3. Click **Add Item**.

NOTES:

- You can click **Delete Item** to delete a parameter from the Parameter formula, or delete the entire parameter formula by clicking **Delete Formula**.
- You can also enter literal strings in the Parameter Formula dialog box. Variable parameters are added to the formula enclosed in <> marks (e.g. <BATCH_NAME>).

When the batch is output, the actual value will be substituted and the value passed as a parameter.

For example, the parameter formula <BATCH_NAME> one two "three four" produces the following four parameters:

```
/BATCH_NAME=Batch99999
one
two
three four
```

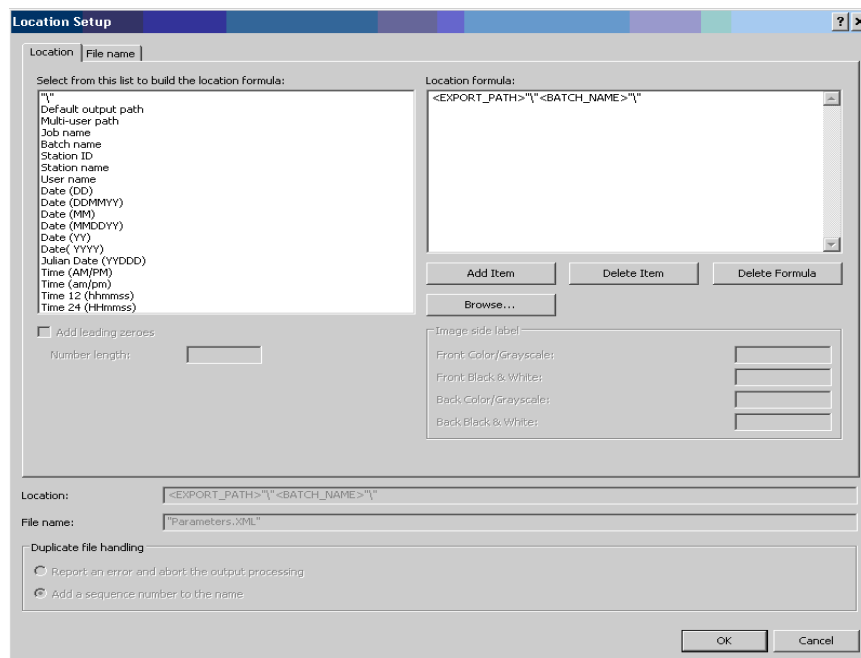
Omit "/tagname=" identifiers on parameters — by default, parameters will be passed to the invoked application preceded by a string of the form /tagname= where *tagname* identifies the parameter type (e.g. /BATCH_NAME=Batch001). Selecting this option will omit this identifier and the program will have to know the number and sequence of passed parameters in order to interpret them properly.

For example, if **Omit "/tagname=" identifiers on parameters** was selected, the formula: <BATCH_NAME> one two "three four" would produce the following parameters:

```
Batch99999
one
two
three four
```

Create output file and send its path as parameter — selecting this option generates an XML file which contains the parameters. The path to this file will be passed to the invoked program as the only parameter.

Location — click **Setup** to specify the path formula and file name for the output file.



In the XML file, string literals will be in a PARAM_LIST element which contains one PARAM element per literal.

Variable parameters will be contained in elements which identify the parameter type (like <BATCH_NAME>).

A schema file **KCCustomApplication.xsd** (see Appendix D) can be used to validate resultant XML files and as a reference during code development.

For example, the location and file name formula
 <EXPORT_PATH>\"
 C:\BatchesPro\Batch001033841\Parameters.XML.

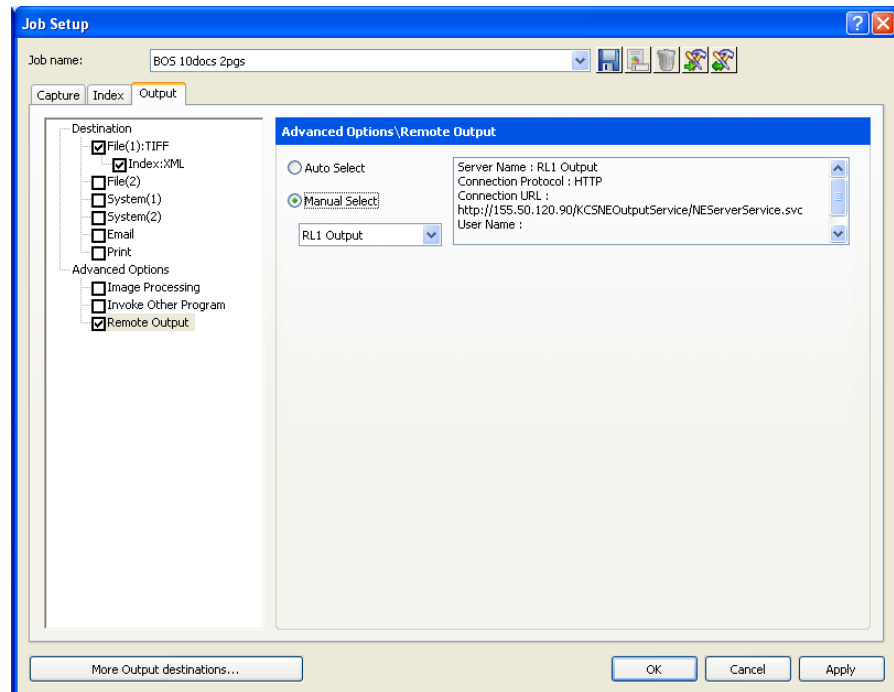
The Parameters.XML file had the following content:

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<KCCustomApplication xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="KCCustomApplication.xsd">
  <PARAM_LIST>
    <PARAM>one</PARAM>
    <PARAM>two</PARAM>
    <PARAM>three four</PARAM>
  </PARAM_LIST>
  <BATCH_NAME>Batch001033841</BATCH_NAME>
</KCCustomApplication>
```

Remote Output (Network Edition only)

Remote Output allows you to transfer batches to a Remote Output server for processing. This is most useful for processing intensive jobs which may slow down capture operations, such as jobs which produce searchable PDF files. Remote Output server configuration is contained in a server map which is configured as part of the Capture Pro Software installation (see the Administrator's Guide for Network Edition).

One or more optional Remote Output servers may be present in a Network Edition configuration.



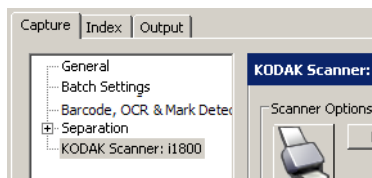
A job setup can be configured to always send batches to a particular output server (Manual Select) or distribute jobs among output servers in a “round robin” fashion (Auto Select).

- If the **Auto Select** option is selected, batches will be assigned in rotation to available output servers. No load balancing will occur.
- If the **Manual Select** option is selected and the server is “down”, an error will be returned to the application and the user will have to manually select another server or change the job setup to **Auto Select**.

When selecting Remote Output servers, it is important to remember that servers must be properly configured to process any jobs sent to them. Server configuration is not within the scope of the Network Edition installation. For example, if a job uses the **Invoke Other Program** option, the invoked program must be installed and configured on the output server. This applies to all types of output including those which rely on external databases or other System Output Destinations.

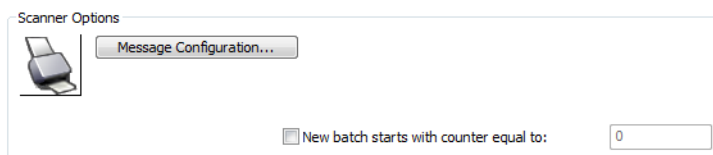
Job Setup: Scanner-specific settings

Not all scanners have scanner-specific settings. This section applies only to scanners that have printing, image addressing, batch, and patch capabilities. If your scanner requires scanner-specific settings, a **KODAK Scanner: iXXX** option will be displayed on the left side of the Capture tab.



Scanner Options

The *Kodak i3000/S3000/i4000/i5000/i1800 Series Scanners* and the *Kodak S2085f* and *i2900 Scanners* provides the Scanner Options box which allows you to access the TWAIN Datasource and setup Message Configuration and other options (e.g., Printing, Image Addressing, Patch, Batch, etc.)



NOTE: Printing, Image Addressing, Batch and Patch options are described in detail in the *Scanning Setup Guide* for your scanner. To obtain a copy of the *Scanning Setup Guide*, go to: www.alarisworld.com/go/support and select your scanner.

Scanner Options



When you click this icon, the TWAIN Datasource will be displayed allowing you to configure your Printer, Image Address, Batch, Patch, etc. options. For information and procedures on using the TWAIN Datasource, refer to the on-line help for the TWAIN Datasource.

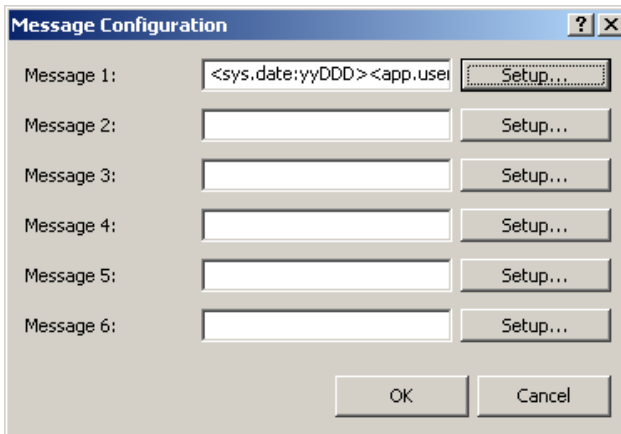
Message Configuration — displays the Message Configuration dialog box. This dialog box allows you to specify custom text to be included in your print string. A maximum of 20 characters is allowed. You can have up to six unique messages per string. The Printer option in the TWAIN Datasource must be enabled and configured before configuring custom messages in Capture Pro Software. See the next section for procedures on customizing your print string.

New batch starts with counter equal to — enter the number you want to start a new batch with.

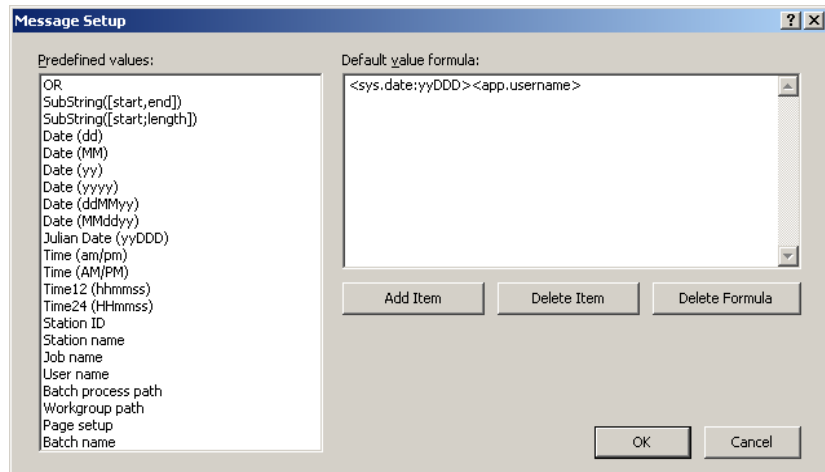
Customizing text for your print string

NOTE: The printer configuration that you set up in Capture Pro Software will override any printer configuration setup in the TWAIN Datasource.

1. Click **Message Configuration**. The Message Configuration dialog box will be displayed.



2. Click **Setup** for each message you want to configure. The Message Setup dialog box will be displayed.



3. Select a value from the *Predefined values* list and click **Add Item**.
4. Click **OK** when finished.

NOTE: Click **Delete Item** to remove the last value in the formula, or **Delete Formula** to delete the entire formula.

Kodak i5850 and i1850S Series Scanners

In addition to the Scanner Options previously described, the *Kodak i5850* Series Scanners and the *Kodak i1850S* Series Scanners provide the following options.

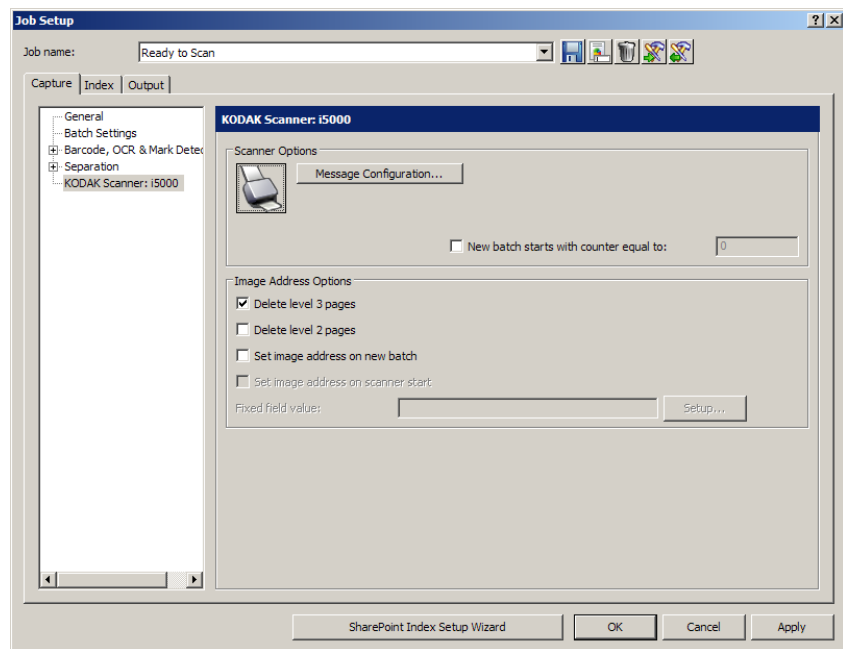


Image Address Options

- **Delete level 3 pages:** this counter is associated with the numeric portion of the batch name. Whenever a level 3 page is scanned, Capture Pro Software will automatically create a new batch and discard the level 3 page.
- **Delete level 2 pages:** this counter is associated with the document number of the current batch. Whenever a level 2 page is scanned, Capture Pro Software will automatically create a new document.
- **Set image address on new batch:** sets the image address value when a new batch is manually created in Capture Pro Software. This option does not affect the image address when batches are automatically created in Capture Pro Software (e.g., blank page separation, bar code separation). By default, the image address default value for a new batch will be as follows:
 - **Fixed field:** the default value as defined in this dialog box.
 - **Level 3:** the batch number portion of the Capture Pro Software batch name (e.g., a value of **19** if the batch name is Batch019).
 - **Level 2:** Capture Pro Software document number for the first document in the batch.
 - **Level 1:** **0** if the image address format is level 2 or level 3.
1 if the image address format is level 1.

- **Set image address on scanner start:** automatically resynchronizes the scanner image address with the current scan batch in Capture Pro Software every time the scanner is started. The image address value is set to what the image address should be for the next scanned page. This option is only available when **Set image address on new batch** is enabled.

When the scanner image address is resynchronized, the image address fields will be set to the following:

- **Fixed field:** will not change from the current scanner value.
- **Level 3:** the batch number portion of the Capture Pro Software batch name.
- **Level 2:** the current Capture Pro Software document number.
- **Level 1:** the number of pages in the current document if the image address format is level 2 or level 3. Number of pages in the current document + 1 if the image address format is level 1.

NOTE: When simultaneous scanning, **Set image address at scanner start** is not recommended. This is because the number of pages in the current document is not correctly maintained by Capture Pro Software when simultaneous scanning. As a result, the level 1 portion of the image address can easily get out of sync.

Fixed field value — this is a static field containing ASCII text that does not increment or change during scanning. Enter the text in the field or click **Setup**, which displays the Fixed Field Value Configuration dialog box.

OK — saves your settings and closes the Job Setup dialog box.

3 Patch Setup

About patch codes

Capture Pro Software allows you to separate pages and documents on your scanner with pages containing patch codes. It also allows you to create attachments to your documents. Before you can use patch code separators, you must set up your job to recognize patch codes.

Capture Pro Software supports three types of patch codes:

Patch Type	Function	Patch kept?
Patch 2	Separates pages into documents	yes
Patch 3	Separates documents into batches	no
Patch T (programmable)	Separates pages into documents Separates documents into batches Creates an attachment	no

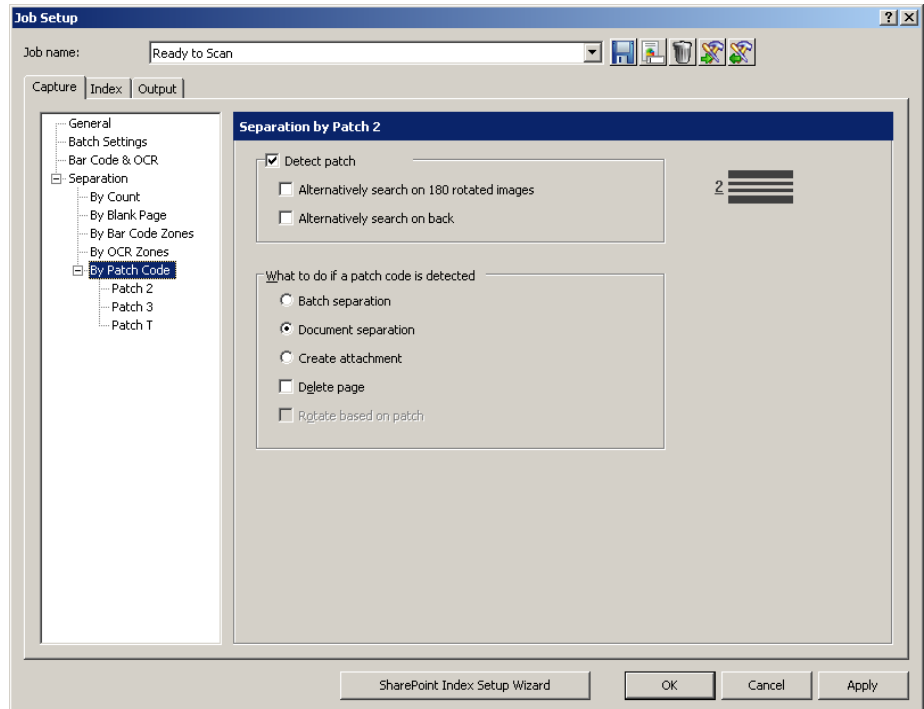
You can define the separation method for each patch code. This is useful for existing jobs where Patch 2 codes were used as document separator pages instead of Patch T codes. You can also define a patch code to create an attachment. For new jobs and for compatibility reasons, it is recommended that you use patch codes the way they were designed to be used.

- For information on patch code reading when color or grayscale scanning, see “Using separators when color scanning” in Chapter 4.
- For information on using patch codes on *Kodak i800* and *i1800* Series Scanners, see “Job Setup: Scanner-specific settings”. When patch code reading is enabled on a *Kodak i800/i1800* Series Scanner, patch code reading with Capture Pro Software is not allowed. Conversely, when patch code reading is enabled with Capture Pro Software, patch code reading on *Kodak i800/i1800* Series Scanners is not allowed.

Setting up patch codes

Patch 2, 3 or T code separation

The Patch 2, 3 or T separation settings under the Capture tab on the Job Setup dialog box allow you to set up Capture Pro Software to recognize patch codes as separators between batches or documents on your scanner. Each patch has its separate window, but the commands are the same in all three windows. You can set up the system to recognize all three patch codes or just certain ones.



NOTES:

- If the **Detect patch** check boxes are disabled in all three Patch Code windows, the patch reader is disabled.
- If you have checked **Detect patch** on any of the Separation by Patch dialog boxes, Capture Pro Software checks each page for the type of patch code you selected.

Detect patch—when checked, enables the **Detect patch** option.

- **Alternatively search on 180 rotated images**—if patch code reading is unsuccessful, this option rotates the image and searches for the patch code again. This option helps prevent a patch code read failure because a page was scanned upside down.

NOTE: The software always searches for patch codes in the first 4 inches (10 cm) of the top of the image after rotation, deskew, and cropping (if any). If a patch is vertical, the image should be rotated with the **Software rotation** option defined on the Page Setup dialog box.

- **Alternatively search on back**—if patch code reading is unsuccessful, this option searches the back side of the document for the patch. If the software detects a patch code on the front side, it will not look for a patch code on the back side.

What to do if patch code is detected—select one of these options:

- **Batch separation:** creates a new batch with a patch code.
 - Patch 3 is normally used to create a new batch.
 - Typically the page containing a patch code for batch separation should not have any content. Therefore, the software discards the patch code page; the next page scanned becomes the first page of the first document in the batch.
- **Document separation:** creates a new document with a patch code.
 - Patch 2 is normally used to create a new document and keep the image of the page containing the patch code.
 - Patch T is normally used to create a new document and delete the image of the page containing the patch code.
- **Create attachment:** creates an attachment with a patch code.
- **Delete page:** deletes the page containing the patch code that started the new document or attachment. This option is important when you use inserts used for document separation purposes that do not contain any other information.
- **Rotate document based on patch:** rotates the image containing the patch code so the patch code is located horizontally on top of the page. All images in the document will be rotated. This option only works when the **Alternatively search on 180 rotated images** option is enabled.
 - The **Rotate document based on patch** option does not work when the patch code separator page is discarded.

OK—closes the dialog box and saves your settings.

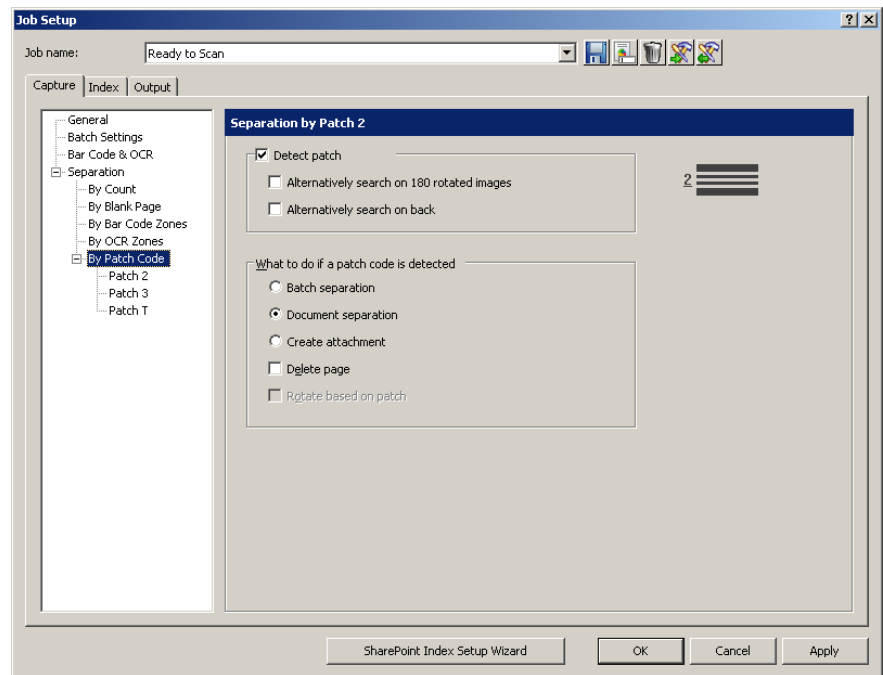
Creating an attachment with a patch code

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select the job from the *Job Name* drop-down list that requires patch code separation.
3. Open the Capture tab and select **Separation>Patch Code**.
4. Select the patch type that you want to define: **Patch 2**, **Patch 3** or **Patch T**. The Patch Code window will be displayed.
5. Click **Detect patch**.
6. Under **What to do if a patch code is selected**, check the **Create Attachment**.
7. Check all other desired options in the Patch Code window.
8. Click **OK**.

Separating batches or documents with patch codes

Capture Pro Software can recognize patch codes as separators between batches or documents on your scanner.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select the job from the *Job Name* drop-down list that requires patch code separation.
3. Open the Capture tab and select **Separation>By Patch Code**.
4. Select the patch type you want to define: **Patch 2**, **Patch 3** or **Patch T**. The Patch Code window will be displayed. You can enable as many of the patch code types as you need.



5. Click **Detect patch**.
6. If desired, check one or both of the following options: **Alternatively search on 180 rotated images** and/or **Alternatively search on back**.
7. Under **What to do if a patch code is selected**, check either the **Document Separation** or **Batch Separation**.
8. Check any other desired options.
9. Click **OK**.

4 Bar Code, OCR and Mark Detection Setup

Overview

To use bar codes, OCR zones or mark detection zones for indexing in your job setup, do the following:

- Select the Page Setup that will be used when scanning into this kind of job.
- Edit the job setup.
- Scan a page to use as a template for defining your bar code, OCR or mark detection zone.
- Define where on the template image the bar code, OCR or mark detection zone will be found.
- Specify how a correct bar code, OCR or mark detection zone value will be recognized.
- Define the page(s) where you want to apply the zones.

In addition to using bar codes or OCR zones for separation in your job setup you must do the following:

- Set up the actions connected to that bar code or OCR zone (e.g., create a new batch, create a new document in the current batch or populate one or more index fields).

This chapter explains these steps, except for populating index fields. Populating index fields can be found in Chapter 2, *Job Setup*.

Using bar codes

Bar coding is a method of encoding data in a machine-readable code consisting of a parallel arrangement of dark and light elements. The light elements are referred to as “spaces” and the dark elements as “bars.” The bars and spaces are either wide or narrow. The combination of wide and narrow bars and spaces is a bar code. Each bar code begins with a “start” character and ends with a “stop” character. The industry uses bar codes to provide more accurate and efficient data input than is possible using manual data entry.

Bar code setup allows you to define the:

- name of the bar code
- data mask or syntax
- physical location where to find the bar code (in a zone or anywhere on the image)
- bar code type (width, height, quality and confidence level)
- level where you can find the bar code (batch, document or page)
- source for capturing the bar code

Follow these tips to maximize the performance of Capture Pro Software:

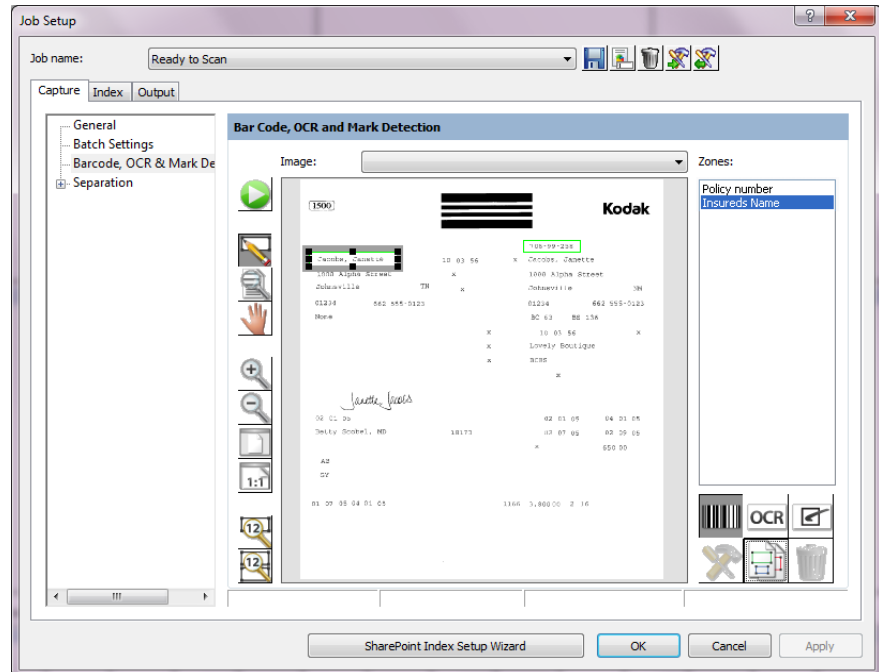
- Choose the Page Setup name that you will use for scanning before you define a bar code zone.
- Make sure that all glass surfaces (the glass guides or glass over the camera area) within the scanner transport are clean. Dirty surfaces cause poor read rates.
- Use a higher resolution to obtain better read rates (300 vs. 200 dpi).
- Check the positioning of the zone around the bar code; it can affect the confidence level of a bar code. Leave at least a 1/4-inch of space around a bar code to guarantee that the full bar code will always fall within the zone. Move the zone around the bar code until the highest confidence rate is achieved.
- The minimum bar code height specification is 40 pixels. At 200 dpi, 40 pixels is 20/100^{ths} of an inch; at 300 dpi, 40 pixels is 13/100^{ths} of an inch. For bar codes smaller than 40 pixels in height, specify a bar code height in the Bar Code Zone Setup dialog box.
- Verify that the correct bar code type and bar code orientation are selected in the Bar Code Zone Setup dialog box.
- If bar codes are on documents with color backgrounds, you may need to lower the threshold value in the Bar Code Zone Setup dialog box for improved read rates.
- If possible, use medium or low density bar codes. High density bar codes may require a lower threshold value in the Bar Code Zone Setup dialog box.
- To achieve better read rates on more difficult bar codes, lower the **Quality** level in the Bar Code Zone Setup dialog box.
- When using **Anywhere** bar code zones, use a PC with a 2.8 GHz processor or higher. This will ensure Capture Pro Software's ability to scan at scanner rated speeds when bar code reading is enabled.

Bar Code, OCR & Mark Detection window

The Bar Code, OCR & Mark Detection window allows you to scan and manipulate an image and create a bar code zone, OCR zone or mark detection zone.

To access the Bar Code, OCR & Mark Detection window:

1. Open the Job Setup dialog box.
2. Click **Bar Code, OCR & Mark Detection** on the Capture tab.



NOTE: Setting eight or more bar code zones for a job may adversely affect your scanning speed.

Image—if desired, select a pre-existing image from the drop-down list. The *Image* drop-down list contains all the images that have been scanned for bar code setup. You must have at least one image in this list before you can define a bar code, OCR or mark detection zone.

NOTE: For typical job setups using bar code zones, OCR or mark detection zones, a single image is all that is required. Multiple images are needed for job setups that have batch and document header sheets, each containing bar code, OCR or mark detection information.

Zones—displays the name of a bar code, OCR or mark detection zone. When you click on one of the zones listed, the image in the display area will highlight where the zone is located on the image. Any bar code, OCR or mark detection zone that you defined will be displayed on the current image, even if you defined those zones using a different image.

Icons

	Start/Scan —opens the Scan Image dialog box, which allows you to enter an Image name and scan an image containing bar codes, OCR text segments or mark areas. NOTE: Capture Pro Software will use whatever Page Setup is currently selected when Start/Scan is selected.
	Draw region —allows you to draw a rectangle around a bar code or OCR text segment or marked area on the scanned image and then displays the Bar Code Zone Setup, OCR Zone or the Mark Detection Zone Setup dialog box.
	Magnify —enlarges a portion of the image. You can enlarge any area on the image where you place the Magnify tool and click and hold.
	Pan —allows you to move the image around when the image is larger than the Bar Code, OCR & Mark Detection window.
	Zoom in —zooms in on the image.
	Zoom out —zooms out on the image.
	Fit window —changes the image display so the image fits the Bar Code, OCR & Mark Detection window.
	Actual size —displays the image at the actual size. One scanned pixel equals one pixel on the Bar Code, OCR & Mark Detection window.
	Test selected bar code, OCR or Mark Detection zone —opens the Bar Code, OCR and Mark Detection Values dialog box, which allows you to view test results on a selected zone.
	Test all selected bar code, OCR or Mark Detection zones —opens the Bar Code, OCR and Mark Detection Values dialog box, which allows you to view test results on all selected zones.
	Create barcode —enables you to create a bar code zone from the displayed image in the Bar Code, OCR & Mark Detection window.
	Create OCR zone —enables you to create an OCR zone from the displayed image in the Bar Code, OCR & Mark Detection window.
	Create mark detection zone —enables you to create an mark detection zone from the displayed image in the Bar Code, OCR & Mark Detection window.

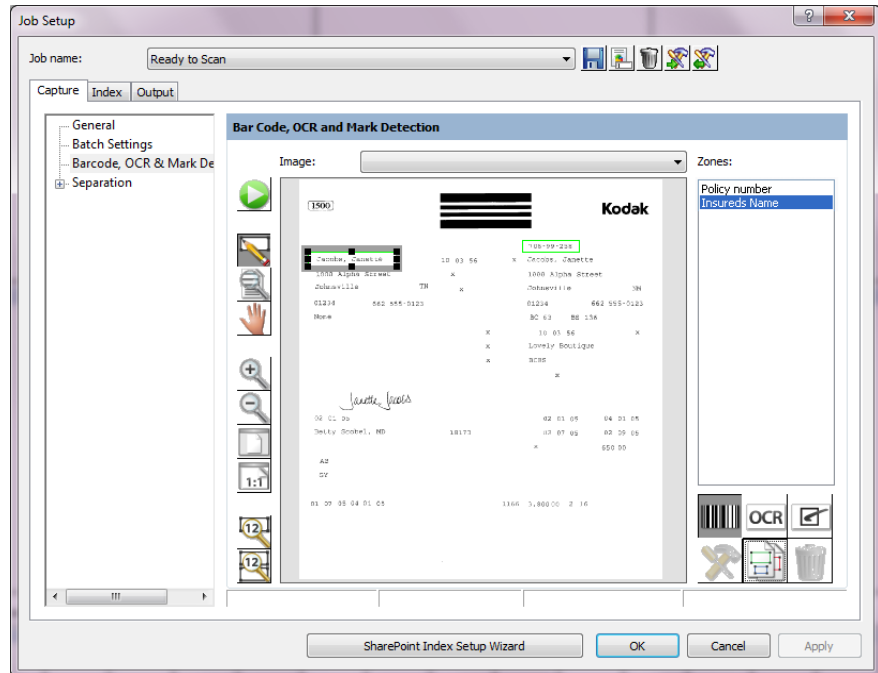
	Zone properties —opens either the Bar Code Zone Setup, OCR Zone Setup or the Mark Detection Zone Setup dialog box which allows you to view the properties of the selected bar code, OCR or mark detection zone.
	Select pages to apply for all zones —opens the Zone Pages Setup dialog box which allows you to select the page or pages to apply the defined OCR, bar code and mark detection zones. For more information see “Zone Pages Setup dialog box” later in this chapter.
	Delete selected zone —allows you to delete a bar code, OCR or mark detection zone. A confirmation box will be displayed to verify your choice.

OK—closes the dialog box and saves your settings.

Bar Code, OCR & Mark Detection windows context-sensitive menu

Cut
Copy
Paste
Test Zone
Test All Zones
Zone Properties
General Properties
Rename Image
Delete Image
Delete Zone
Delete All Zones

When you right-click on an image in the Bar Code, OCR & Mark Detection window, a context-sensitive menu will be displayed. If no bar code, OCR or mark detection zones are selected, a more limited menu will be displayed.



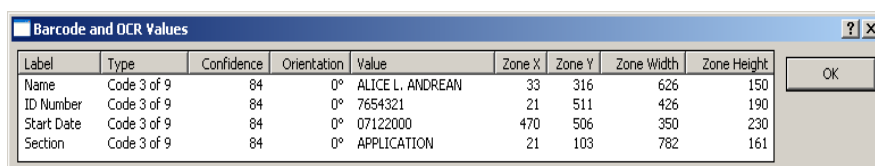
Cut—removes the selected bar code, OCR or mark detection zone. If you want, you can paste this bar code, OCR or mark detection to another location on the same image by left-clicking on the zone and dragging it to the new location.

Copy—copies the selected bar code, OCR or mark detection. Copy is also useful when several bar code, OCR or mark detection zones of the exact same properties (except for location) are required. After defining the first zone, use the Paste option to duplicate it. After creating each duplicate zone, move it by left-clicking on the zone and dragging it to the desired location.

Paste—pastes a copied or cut bar code, OCR or mark detection zone into the current image. The Paste option appears on this menu only if you have copied an image or text string into the clipboard. When pasting a bar code, OCR or mark detection, the zone coordinates from the saved zone are used in determining the location of the zone. If the pasted zone is in the wrong location, you can left-click on the zone and move it to the desired location.

Paste is useful in conjunction with Copy when copying bar code zone properties to another image containing bar codes in the job.

Test Zone and **Test All Zones**—attempts to read all or the selected bar code, OCR or mark detection zones for a value. The Bar Code, OCR and Mark Detection Values dialog box will be displayed.



Label	Type	Confidence	Orientation	Value	Zone X	Zone Y	Zone Width	Zone Height
Name	Code 3 of 9	84	0°	ALICE L. ANDREAN	33	316	626	150
ID Number	Code 3 of 9	84	0°	7654321	21	511	426	190
Start Date	Code 3 of 9	84	0°	07122000	470	506	350	230
Section	Code 3 of 9	84	0°	APPLICATION	21	103	782	161

This dialog box provides the following information:

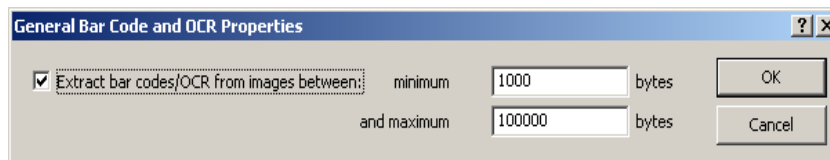
- **Label** indicates the name assigned to the bar code, OCR or mark detection zone on the Bar Code (OCR/Mark Detection) Zone dialog box.
- **Type** indicates the type of bar code found in the zone. If the zone is an OCR zone, the **Type** will be OCR. If the zone is a mark detection zone, the Type will be Mark Detection.
- **Confidence level** (in a percentage) of the bar code value found.
- **Orientation** of the bar code, OCR or mark detection zone
0° represents a horizontal, right-side-up bar code, OCR or mark detection zone
90° represents a vertical, top to the left bar code, OCR or mark detection zone
180° represents a horizontal, upside-down bar code, OCR or mark detection zone
270° represents a vertical, top to the right bar code, OCR or mark detection zone
- **Value** of the bar code, OCR or mark detection zone.
- **Zone X** and **Zone Y** coordinates of the upper left corner of the bar code, OCR or mark detection zone. The coordinates are in 1/100ths of an inch and represent the distance of the zone from the upper-left corner of the image.
- **Zone Width** and **Zone Height** of the bar code, OCR or mark detection zone in units of 1/100ths of an inch.

NOTE: If a bar code, OCR or mark detection value cannot be found for a zone, the zone is still included in the value list with only the label and zone coordinates displayed.

Zone Properties—allows you to define the properties for the currently selected bar code, OCR or mark detection zone. The Bar Code (OCR/Mark Detection) Zone dialog box will be displayed. See “Bar Code Zone Setup dialog box”, “OCR Zone Setup dialog box” or “Mark Detection Zone Setup dialog box” later in this chapter for more information.

General Properties—allows you define properties that will apply to all bar code, OCR and mark detection zones. This option is useful when using bar code header sheets for document separation and indexing that has less content than the rest of the pages of the document. This option can increase the performance of scanning into the bar code/mark detection/OCR application.

When you select this option, the General Bar Code and OCR Properties dialog box will be displayed.



1. Select the **Extract bar codes/OCR from images between** checkbox to activate this option.
2. Enter a value in the *minimum bytes* field (default 1000 bytes) and the *maximum bytes* field (default 100000 bytes). The values entered in these fields limit the images from which bar codes, OCR or mark detection text will be read to only those whose size falls between these values.
3. Click **OK**.

Rename Image—prompts you to rename the currently displayed image. When naming or renaming an image, choose an image name that is unique to Capture Pro Software. A file extension is not required.

NOTE: Special characters such as: “ ? * . < > \ / are not allowed in the image name.

Delete Image—removes the current image from the job. Before your image is deleted, a confirmation box will be displayed to verify your choice. If other images remain in the image list, then the image preceding the deleted image will be displayed in its place.

Bar code, OCR and mark detection zone definitions are not affected when you delete an image as long as you have other images on the image list. However, if the image to be deleted is the last image in the image list, the following message will be displayed: ***This is the last image. Deleting this image also deletes all bar code, OCR or mark detection zones. Do you want to delete this image?***

If you click **Yes**, all your bar code, OCR or mark detection zone definitions for the job will also be deleted. An image must exist in the image list in order to define bar code, OCR or mark detection zones. If you delete the last image, you also delete all the bar code, OCR and mark detection zones.

Delete Zone—deletes the selected bar code, OCR or mark detection zone. A confirmation box will be displayed before the zone is deleted.

Delete All Zones—deletes all the bar code, OCR and mark detection zones that you defined for this job. A confirmation box will be displayed before the zones are deleted.

Scanning an image for bar code setup

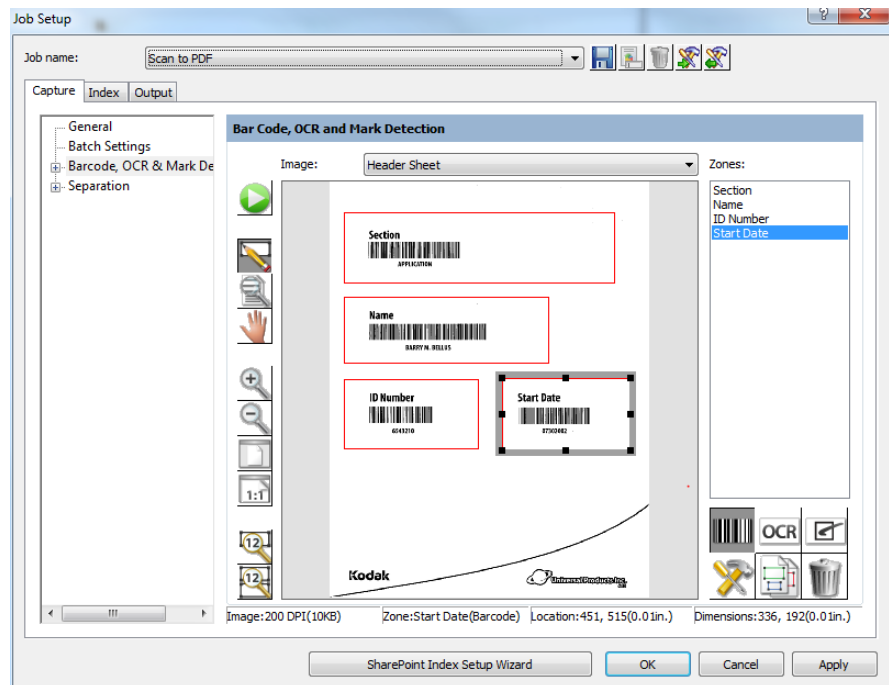
Capture Pro Software allows you to separate pages and documents on your scanner with pages containing bar codes. It also allows you to create attachments to your documents using these bar code separators.

Before you can use bar codes as separators, you must:

- Scan an image containing the bar codes into Capture Pro Software.
- Draw and select the bar code zones.
- Set up your job for bar code zone separation.

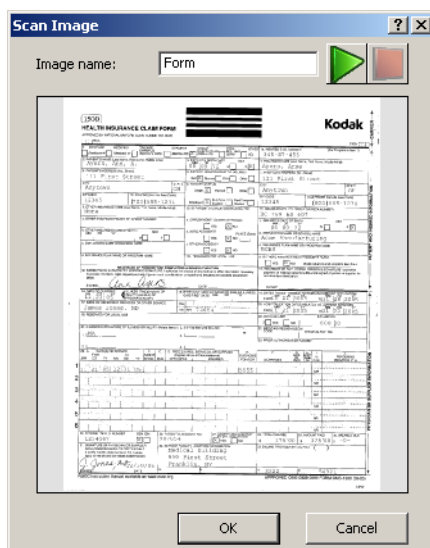
Capture Pro Software allows you to scan bar code images directly into the Bar Code window for viewing, defining and editing.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Separation > By Bar Code Zones**. The Bar Code window will be displayed.



4. Select the green **Start/Scan** button. The Scan Image dialog box will be displayed.

5. Position the original document in the feeder and click **Start/Scan**. The image will be displayed in the dialog box. Scan the image as straight as possible. Your scanner will use the parameters of the current Capture Pro Software page setup.



NOTES:

- Any auto-rotation, auto-cropping and deskew settings from the current template will also be applied to the scanned image before it is displayed.
- If the image is acceptable, enter a name in the *Image name* field. The image name should not contain any of the following characters: : " ? * . < > \ / .
- To discard the image, click **Cancel**.

6. Click **OK** to save the image.

NOTES:

- Before you can define a bar code, you must save at least one image in the *Image* drop-down list.
- You can also transfer an image from the Image Viewer to the Bar Code window. See "Transferring an image to the bar code window" later in this chapter.

Creating and selecting a bar code zone

Before you can use a bar code image for indexing or separation to separate documents or batches, you need to create and select a bar code zone. Bar code zones are created to indicate where to look for a bar code that satisfies your bar code zone properties.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Separation>By Bar Code Zones**. The Bar Code window will be displayed.
4. Select an image from the *Image* drop-down list. If you need to scan the image, click the green **Start/Scan** icon on the Bar Code window.

NOTES:

- Place the mouse cursor at the top-left corner of the area of the image where you want to define the location for this bar code zone.
 - Bar code zones are specific to a particular job; not a specific image. Therefore, when you create a new image, Capture Pro Software will display the zones that you defined using previous images.
 - When drawing the location for a bar code zone, leave a border area of approximately 1/4-inch around the bar code. This border is often necessary for successful bar code reading. Bar code zone locations can overlap.
5. Click the left mouse button and drag the cursor to draw a rectangle around the area of the bar code. Bar codes defined with the **Zone** position selected on the Bar Code Zone Setup dialog box will be enclosed in a red box while those defined with **Anywhere** will be enclosed in a blue box. After you draw the rectangle, the Bar Code Zone Setup dialog box will be displayed.
 6. In the *Zone name* field, enter a name for the new bar code zone. You must create a name in order to save the zone.
 7. After entering your other settings, click **OK** to close the dialog box and return to the Bar Code window. See "Bar Code Zone Setup dialog box" for field descriptions.
 8. Click **OK** to save your settings and close the Job Setup dialog box.

Bar Code Zone Setup dialog box

Use this dialog box to name your bar code zone, describe how to recognize a valid bar code for this zone and specify any bar code separation.

Bar Code Zone Setup

Zone name:

Side: ☒ Front ☐ Back

Keep bar codes with mask:

Minimum length:

Bar code width:

Bar code height:

(Size in 1/100 inch, 0 = Variable)

Type:

- Code 2 of 5
- Interleaved 2 of 5
- Airline 2 of 5
- Barcode 32
- Code 3 of 9
- Codabar
- Code 93
- Code 128
- EAN 13
- EAN 8
- UPC-A
- UPC-E
- UCC Code 128

☐ Verify checksum

☐ Minimum partial read characters:

Filtering:

Process bar code by: ☒ Auto ☐ Capture Pro

Read value:

Orientation:

Confidence:

Quality: Worst Best

Position: ☐ Anywhere ☒ Zone

☒ Alternatively search on 180 rotated images

☒ Alternatively search on the reverse side

☐ Rotate based on bar code

☐ Read all bar codes

Separation: ☐ Create a new batch ☐ Create a new document ☐ Next page stays in current document ☐ Only separate when change in value ☒ No separation

Bar code is located on:

☐ Delete page

OK Cancel

Zone name—enter the name for your new bar code zone. This name identifies the bar code and appears in Index setup as BC_[zonename] in the list of default values. The bar code *Label* (from the Barcode and OCR Values dialog box) does not define or identify a Capture Pro Software index field.

Side: Front or Back—select whether the bar code is located on the front or back of an image.

Keep bar codes with mask—use this option when one or more *Anywhere* bar code zones are defined. The bar code value is only retained for the defined zone when it complies with the mask specified in the *Keep bar codes with mask* field. This ensures that the bar code values read on a page are assigned to the correct bar code zone.

This option is also useful when more than one bar code zone is in the same physical location on a page but have different values and meanings (e.g., a zone defined for a batch header sheet versus a zone defined for a document header sheet). To comply with a specified mask, each character of the bar code value must match the mask syntax for that character's position in the mask.

For example, a mask of **A<8>** will retain a bar code value of up to, but not exceeding, eight alphabetic characters:

Bar Code Value Retained?

SURGERY Yes

ADMISSION No

If applicable, enter a mask value.

Minimum length—enter a number for the minimum length of the bar code value. By default, this option is set to the length of the tested bar code value. If a value is not found or the value is equal to or greater than six characters, the default will be set to “6.” It is recommended that the minimum length parameter be set at six characters or fewer to allow Capture Pro Software to retain bar code values in cases of a partial reading.

If the **Partial Reading** option is not required or enabled, then the mask and minimum length settings can be used in combination to further restrict the retained bar code values.

For example:

Mask: 9(10)

Minimum bytes: 6

retains bar code values between six and ten digits, while

Mask: 9(10)

Minimum length: 10

retains bar code values only if they are exactly ten digits.

Bar code width and Bar code height—if the bar code has a fixed length or height, enter these values in 1/100ths of an inch. An entry in one or both of these fields increases the performance of bar code reading. If one of the dimensions is variable, enter **0**. The default is 0.

Bar code dimensions can vary depending on the amount of skew. Therefore, it is recommended that you enter these values only when you are sure of the dimensions of the bar code.

NOTE: You must specify a bar code height for bar codes that are smaller than 40 pixels high (e.g., at 200 dpi, 40 pixels is 20/100^{ths} of an inch).

When specifying a bar code width and/or height, the tolerance is $\pm 10\%$ (e.g., if you specify 20/100^{ths} of an inch for the bar code height, any bar code between 18/100^{ths} of an inch and 22/100^{ths} on an inch will be detected).

Type—you may also select additional bar code types that will be considered valid for this bar code zone. Although it is unusual that more than one bar code type would be found within a zone, it is possible to select multiple bar code types. For more information on bar code types, see “Bar code types” later in this chapter.

The more bar code types you select, the slower your scanning performance.

When you draw a bar code location, Capture Pro Software searches the location for all bar code types. When successful, the software sets the bar code type to the one found. Otherwise, a bar code type is not selected. There are two exceptions:

- For Code 39 Extended and Code 39 HIBC bar codes, Capture Pro Software may set the bar code type to Code 39. As a result, you may need to manually select **Code 39 Extended** and **Code 39 HIBC**.
- For MSIPH bar codes, Capture Pro Software may set the bar code type to MSI. As a result, you may need to manually select **MSIPH**.

Bar code zone dialog box (continued)

Bar Code Zone Setup

Zone name:

Side: ☒ Front ☐ Back

Keep bar codes with mask:

Minimum length:

Bar code width:

Bar code height:

(Size in 1/100 inch, 0 = Variable)

Type:

- Code 2 of 5
- Interleaved 2 of 5
- Airline 2 of 5
- Barcode 32
- Code 3 of 9
- Codabar
- Code 93
- Code 128
- EAN 13
- EAN 8
- UPC-A
- UPC-E
- UCC Code 128

☐ Verify checksum

☐ Minimum partial read characters:

Filtering:

Process barcode by:

☒ Auto ☐ Capture Pro

Verify checksum—check this box if the bar code contains a checksum character. Checksum characters help ensure the accuracy of bar code reading. Not all bar code types support checksum verification. Bar code types that optionally support checksum verification include:

Code 3 of 9
CODABAR
Interleaved 2 of 5

Some bar code types like PDF417, UPC and EAN have a built-in checksum routine that cannot be disabled.

If you disable **Verify checksum** for bar codes containing a checksum, the checksum value (usually the last character of the bar code) will appear in the bar code value; otherwise, the check digit will remain hidden.

If checksum verification fails during scanning, a bar code value is not generated, causing Capture Pro Software index field audits to fail. Some bar code types, such as Code 128, have mandatory checksum characters. The code is always present and must be correct for the value to be read. Other codes such, as Code 39, have optional checksum characters which then add an additional code when present.

To read invalid Code 128 symbols, you can select the **Minimum partial read characters** option. It will report the data characters even if checksum fails. The invalid checksum will not be returned. When the bar code has an optional checksum, it will not be validated by the software. It will operate based on the bar code specification.

Selecting **Minimum partial read characters** for a bar code with an optional checksum will return what it finds, whether it is good or bad. There will be occasions when the bar code returns the correct result but the checksum itself fails. Since the checksum is implicit, it is not returned and cannot be directly tested.

Minimum partial read characters—check this box when you want Capture Pro Software to generate a bar code value, even if a bar code is incomplete. If this option is checked, enter the minimum number of characters that will be allowed for a partial read. This is useful for bar codes that are only used for document or batch separation where the absolute value is less critical.

For indexing purposes, it is recommended that you define field masks and minimum lengths. Capture Pro Software will not produce any bar code value if the bar code is incomplete and the *Minimum partial read characters* field is disabled.

NOTE: **Minimum partial read characters** should not be used when **Verify checksum** is enabled, as this may result in a bar code value being generated when checksum verification fails.

Filtering—when reading barcodes from fax machines or other devices that may have CCD pixel dropout, applying a filter may help the read rate if bars are missing pixels. Selecting **Filter1** will fill a gap in a bar of 1 pixel. **Filter2** will fill a gap of 2 pixels, etc.

Process bar code by—when set to **Auto**, the bar code will be read in the scanner if possible. If the scanner reaches its maximum number of bar codes or the bar code is not supported in the scanner, then the bar code will be read by Capture Pro. When set to **Capture Pro**, the bar code will be read in the software.

Advantages of reading bar codes in the scanner (Auto):

- Fast—bar codes are read at full scanner speeds.
- Resolution—bar codes are detected at full image resolution (1200 dpi). Image processing and compression may degrade edges on some scanner models.

Disadvantages of reading bar codes in the scanner (Auto):

- The scanner can read fewer bar codes per image than Capture Pro
- The scanner reads fewer bar code types than Capture Pro.

NOTE: If you choose the option **Read all bar codes**, then **Process bar code by** must be set to **Capture Pro**.

Orientation—select an orientation option from the drop-down list. If your bar codes all share the same orientation (e.g., all horizontal or all vertical), it is recommended that you indicate the specific orientation; this will increase bar code read and scanning performance.

If your bar codes are predominantly in the same orientation (e.g., horizontal) but may have an occasional bar code in the opposite direction (e.g., vertical) it is recommended that you use the appropriate "and" orientation (e.g., **Horizontal and Vertical**).

When the bar code zone is first created, Capture Pro Software automatically sets the orientation to the orientation of the bar code, if found. **Horizontal** is the default.

Confidence—enter a confidence ratio number to restrict what Capture Pro Software considers a successful bar code read. For example, the higher the value you enter, the chance of misreading bar codes will be reduced.

Quality—select a quality setting between **Worst** and **Best**. The highest quality bar codes are printed by a laser printer or pre-printed with an offset printer. Lower quality bar codes are printed with inkjet or dot-matrix technology.

Depending on the quality of bar codes being scanned, set the Quality level accordingly. The higher the quality setting, the faster the bar code read performance.

Bar code zone dialog box (continued)

Position—select **Anywhere** or **Zone**.

- **Anywhere**: when creating a zone for an Anywhere bar code, draw a location around one bar code somewhere on the page, and select the **Anywhere** option. This situation often occurs when bar codes may be found at unpredictable locations on documents. When looking for Anywhere bar codes, Capture Pro Software searches the image from top to bottom for horizontal and vertical bar codes. This search order is important to understand if you have more than one Anywhere bar code on a page or zone.
- **Zone**: increases bar code reading and scanning performance and is the default setting.
 - **Alternatively search on 180° rotated images**—can only be used when the **Zone** option is enabled. When bar code reading is unsuccessful, Capture Pro Software will also look for the zone after rotating an image 180 degrees. This slows down bar code reading and scanning, but prevents a bar code read failure because a page was scanned upside down. The image is not permanently rotated unless the **Rotate based on bar code** option is selected.
- **Alternatively search on the reverse side**—checking this option increases document/batch separation and indexing accuracy when pages are accidentally reversed before scanning.
- **Rotate based on bar code**—Capture Pro Software can determine if a bar code is rotated 180 degrees and will rotate the bar code page 180 degrees to display it in the correct orientation. This option is used for document separation. All of the pages of the document will be rotated in the same manner as the lead page containing the bar code zone. If required, only one bar code zone should have the **Rotate based on bar code** option enabled.

NOTE: **Batch rotation** is not supported in Capture Pro Software.

Read all bar codes: when this option is checked and the *Position* is **Anywhere**, all bar codes on the page will be read. The bar code values will be separated by the ^ character. The order of the values will be the order that the bar codes were found when searching from left to right and top to bottom on the page.

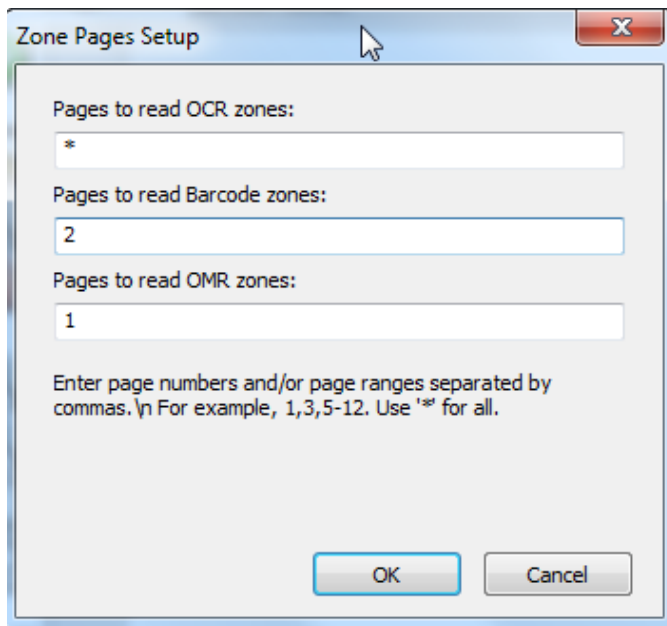
NOTE: If you choose the option **Read all bar codes**, then **Process bar code by** must be set to **Capture Pro**.

Separation—the following options are available:

- **Create a new batch**—all images after the separation go into a new document in a new batch.
- **Create a new document**—all images after separation go into a new document in the current batch.
- **Next page stays in current document**—the next page after the separation remains in the current document.
- **Only separate when change in value**—the software separates by a document or batch only if a value changes.
- **No separation**—select **Batch level** or **Document level** for the bar code zones:
 - **Bar code is located on: Batch level:** bar codes that are located on the Batch level or that separate batches are available for Batch and Document indexing. Batch level bar codes are only read when they are present on a Batch Header page. A Batch Header page exists whenever batch separation is defined using patch codes or bar codes (at least one bar code zone in the job is configured for batch separation).
 - **Bar code is located on: Document level:** bar codes that are located on the Document level or that separate documents are available for Document indexing. They are not available for Batch indexing.
- **Delete Page**—select this option to delete the page containing the bar code that started the new document. This is important when inserts are used for the purpose of document separation and do not contain any significant information. The bar code, however, is still available for Document level indexing.

Zone Pages Setup dialog box

By default, the bar code (OCR, mark detection) zone(s) will only be applied to the first page of a document. To read bar codes (extract text or check for marks) on additional pages use the Zone Page Setup dialog box to select a specific page or a range of pages. The Zone Page Setup dialog box is displayed by selecting the **Select pages to apply for all zones** icon located in the bottom right corner of the Bar Code, OCR and Mark Detection Job Setup dialog box. The Zone Pages Setup dialog box allows you to separately select the page or pages to apply the defined bar code, OCR and mark detection zones.



Pages to read OCR zones—used to select the page or pages to apply all the defined OCR zones. Multiple pages may be entered by separating the page numbers with commas “,”. For example, “3-8”. For each of the defined OCR zones, the specified page or pages will be checked for valid text. If valid text is found in the zone, the zone will be assigned the text read. Any valid text within the zone on a following page will replace any previous text that had been read.

If a document has less pages than the page entered, then the zone value will remain empty. For example, if a document has 6 pages and the pages to read is set to “8, 11-15”, the zone value will remain empty even if the first 6 pages contained valid text within the zone.

If you need to always read the value in the zone on the last page of the document and the document may contain a variable number of pages, the asterisk “*” may be used to read every page of the document. The value read on the last page will be the final value assigned to the zone.

NOTE: If the value on the last page is not readable or valid, then a valid value on a previous page will be assigned to the zone.

If the **Pages to read Bar Code** is empty, then none of the OCR zones will be read.

Pages to read Bar code—used to select the page or pages to apply all the defined bar code zones. Multiple pages may be entered by separating the page numbers with commas ','. For example, "1,2,5,6". A range of pages may be entered by entering the first page number, a dash '-', and the last page number. For example, "3-8". For each of the defined bar code zones, the specified page or pages will be checked for a valid bar code. If a valid bar code value is found in the zone, the zone will be assigned the bar code value read. A valid bar code within the zone on a following page will replace any previous bar code values that have been read.

If a document has less pages than the page entered, then the zone value will remain empty. For example, if a document has 6 pages and the pages to read is set to "8, 11-15", the zone value will remain empty even if the first 6 pages contain one or more valid bar codes.

If you need to always read the value in the zone on the last page of document and the document may contain a variable number of pages, the asterisk '*' may be used to read every page of the document. The value read on the last page will be the final value assigned to the zone.

NOTE: If the value on the last page is not readable or valid, then a valid value on a previous page will be assigned to the zone.

If the *Pages to read Bar Code* field is empty then none of the bar codes zones will be read.

Pages to read OMR (Optical Mark Recognition) zones—specifying multiple pages for applying mark detection zones is rarely practical. If the mark detection zones are defined as "No Frame" then the last page specified in the page range will determine the value of the mark detection zone. Even mark detection zones defined as containing a "Frame" may produce poor results.

Separating documents with bar code zones

Capture Pro Software allows you to separate documents with bar code zones within a batch:

1. Select **File > Job Setup** and select a job and batch.
2. Open the Capture tab and select **Separation > By Bar Code Zones**. The Separation by Bar Code Zone window will be displayed.
3. Select an existing bar code zone or define a new bar code zone.
4. Right-click the mouse button to display the context-sensitive menu and click **Zone Properties**. The Bar Code Zone Setup dialog box will be displayed.
5. Under **Separation**, select **Create a new document**.
6. Check the **Delete page** option if you want to delete the page containing the bar code that started the new document.
7. Fill in the *Keep bar codes with mask* and/or *Minimum length* fields if you want to restrict document separation to a specific bar code value or mask.
8. Select **Rotate based on bar code** if you want to rotate all pages in the document in the same orientation as the orientation of the bar code on the Document Header. Rotating the document based on the bar code does not work when the bar code separator page is deleted.

For example:

Mask = "ER"9(8)"-999 Minimum length = 14: Only bar code values with a length of 14 characters, starting with the string "ER" followed by eight numeric characters, a hyphen and three numeric characters start a new document.

For instance, the patient number bar code on the cover sheet of a folder starts a new document. The patient number can, in that case, also be used as a document index. If a bar code in the same zone creates a batch with a certain value and a document with another value, two zones must be drawn on top of each other.

9. After entering your other settings, click **OK** to close the dialog box and return to the Separation by Bar Code window.
10. Click **OK** to save your settings and exit the Job Setup dialog box.

Separating batches with bar code zones

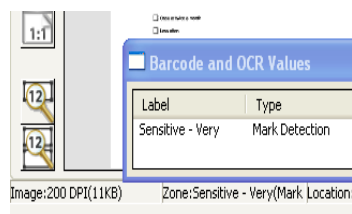
1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By Bar Code Zone**. The Separation by Bar Code Zone window will be displayed.
4. Select an existing bar code zone or define a new bar code zone.
5. Right-click the mouse button to display the context-sensitive menu and click **Zone Properties**. The Bar Code Zone Setup dialog box will be displayed.
6. Under **Separation**, select **Create a new batch**.
7. Click **OK** to exit the dialog box and return to the Separation by Bar Code window.
8. Click **OK** to save your settings and exit the Job Setup dialog box.

NOTES:

- Bar code zones to be used for batch level indexing are only read when they are present on a Batch Header page.
- A Batch Header page exists whenever batch separation is defined using patch codes, bar codes or OCR zones (at least one zone in the job is configured for Batch separation).

Editing a bar code zone

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Separation > By Bar Code Zones**. The Separation by Bar Code Zone window will be displayed.
4. Click on the bar code zone that you want to change, or click on the bar code zone name in the list on the right side of the Separation by Bar Code Zone window.
5. Right-click the mouse button to display the context-sensitive menu and click **Zone Properties**. The Bar Code Zone Setup dialog box will be displayed.
6. After you change your settings, click **OK** to close the dialog box.
7. Click **OK** to save your settings and close the Job Setup dialog box.
8. After editing a bar code zone, test the bar code to verify that it is still readable.



Deleting a bar code zone

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Separation > By Bar Code Zones**. The Separation by Bar Code Zone window will be displayed.
4. Click on the bar code zone that you want to delete. You can also click on the bar code zone name in the list on the left side of the Bar Code window. The zone is highlighted.
5. Click **Delete**.
6. Click **OK** to save your settings and close the Job Setup dialog box.

Transferring an image to the bar code window

Capture Pro Software allows you to transfer an image containing bar codes from the Image Viewer into the Bar Code window for creating bar code zones.

1. In the Main window, scan your image containing the bar code.
2. Locate and right-click on the image you want to transfer in the Image Viewer.
3. Select **Copy Image to Job Setup**. The Copy Image to Job Setup dialog box will be displayed.



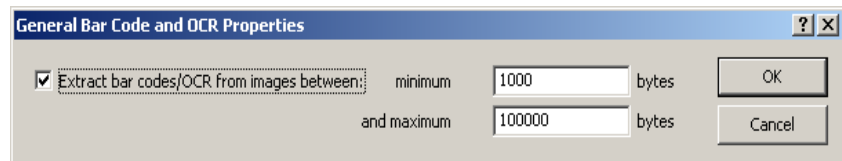
4. Enter the new image name in the *Save image as* field.
5. Click **OK**. You can now view the image in the Bar Code window and use it to create a bar code zone.

You can also directly scan bar code images into the Bar Code window. See “Scanning an image for bar code setup” earlier in this chapter.

Setting the range for bar code image size

When you define bar code zones, every page you scan will be checked to see if it contains those bar codes. This checking can slow scanning performance. If your bar code pages always have about the same byte count size, and if that size is different from other pages you scan, you can indicate to the software that only images within a particular size (byte count) range need to be checked for bar codes. That setting can speed up scanning performance.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By Bar Code Zones**. The Separation by Bar Code Zone window will be displayed.
4. Select any image and right-click on a bar code zone. The General Bar Code and OCR Zone Properties dialog box will be displayed.



NOTE: If a bar code zone does not exist, this option will not be available until a bar code zone is defined.

5. Check the **Extract bar codes/OCR from images between** checkbox and set a range for minimum and maximum byte size.
6. After you make your settings, click **OK** to close the dialog box and return to the Bar Code window.
7. Click **OK** to save your settings and close the Job Setup dialog box. The new image range is now saved.
8. After editing a bar code zone test the bar code zone to verify that it is still readable.

NOTE: When scanning both color/grayscale and black and white images, specify the range of the black and white image.

Creating an attachment with bar code zones

1. Select **File > Job Setup**, select a job and open the Capture tab.
2. Select **Separation > By Bar Code Zones**. The Bar Code window will be displayed.
3. Select an existing bar code zone or define a new bar code zone.
4. Right-click the mouse button to display the context-sensitive menu and click **Zone Properties**. The Bar Code Zone Setup dialog box will be displayed.
5. Under **Separation**, select **Next page stays in current document**. This option is only valid for one attachment page. If multiple attachments are required, then an attachment bar code must be applied to each attachment. The bar code on the attachment page is not available for indexing.
6. Check the **Delete page** option to delete the page (both front and rear) containing the bar code and to use the next page as the attachment. This is useful when inserts are applied indicating whether the next page is an attachment. Any rotation will apply to the next page.
7. Fill in the *Keep bar codes with mask* and/or *Minimum length* fields if you want to restrict attachments to a specific bar code value or mask.
8. Select the **Rotate based on bar code** checkbox if you want to rotate the attachment (both front and rear) in the same orientation as the orientation of the bar code on the page.
9. Click **OK** to save your settings and close the dialog box.

Testing bar code zones

When you define a new bar code zone from an image, Capture Pro Software automatically checks your zone to verify that it is readable. However, if you edit the bar code zone or change its properties later, it may no longer be readable. You can manually test your bar code zones to verify that Capture Pro Software can still read them.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By Bar Code Zones**. The Bar Code window will be displayed.
4. Click the **Test All Bar Code, OCR & Mark Detection Zones** icon to test all bar codes or click **Test Selected Bar Code, OCR & Mark Detection Zones** icon to test an individual bar code zone. The Bar Code, OCR & Mark Detection Values dialog box will be displayed.
5. After viewing the values in this box, click **OK** to return to the Bar Code window.
6. Click **OK** to save your settings and exit the Job Setup dialog box. All your bar code zones have now been tested. If you make any changes to the bar code settings, test them again.

Bar code types

Capture Pro Software supports the following bar code types:

- Airline 2 of 5
- Aztec
- Barcode 32
- CODABAR
- Code 128
- Code 2 of 5—mutually exclusive with Interleaved 2 of 5
- Code 3 of 9
- Code 39 (no stop start)
- Code 39 Extended
- Code 93
- Data Matrix
- EAN 13
- EAN 8
- Intelligent Mail Barcode
- Interleaved of 2 of 5—mutually exclusive with Code 2 of 5
- PDF417—a high-density, two-dimensional bar code type that can contain up to 1250 bytes of information in a few square inches. With this kind of density, all index data for a document can be contained in a single bar code.
- Planet (US Post Office Code)
- PostNet (Postal): cannot be selected with any other bar code type
- QR Code
- UCC Code 128
- UPC-A
- UPC-E

Special syntax for two-dimensional bar codes

When using two-dimensional bar codes, a single bar code can be used to contain all the index data for a document or batch. To facilitate indexing with two-dimensional bar codes, a special substring syntax has been added:

<barcode.zonename:[start;length]>
<barcode.zonename:[start;end]>
<barcode.zonename:[# of data elements, delimiter (in single quotes)]>

The delimiter can either be the actual character symbol or its ASCII decimal numeric value (for symbols that cannot be printed or typed). The delimiter must be contained in double quotes (" ").

For example, if a PDF417 bar code contains the following data:
12345678*NURSERY*11/19/1962 the following could be used as default values for the three index fields of data:

Default Value	Actual Value
<BC.PDF417:[1, '*']>	12345678
Returns the 1st element of the bar code string delimited by an asterisk.	
<BC.PDF417:[2, '42']>	NURSERY
Returns the 2nd element of the bar code string delimited by an asterisk (42 is the ASCII decimal value for asterisk).	
<BC.PDF417:[3, '*']>	11/19/1962
Returns the 3rd element of the bar code string delimited by an asterisk.	

Using OCR zones

OCR (Optical Character Recognition) is the mechanical or electronic translation of images of typewritten or printed text (usually captured by a scanner) into machine-editable text.

OCR setup allows you to define:

- the name of the OCR zone
- the physical location where you find the text (zone location on the image)
- the level where you can find the text (batch or document level)

Use the Bar Code, OCR and Mark Detection Setup function on the Capture tab on the Job Setup dialog box to set up the bar code reader to read one or more bar codes or OCR parameters for one or more OCR zones.

The OCR zone separation setting on the Capture tab in the Job Setup dialog box allows you to scan an image into the Separation by OCR Zone window and define zones and OCR zone-specific properties.

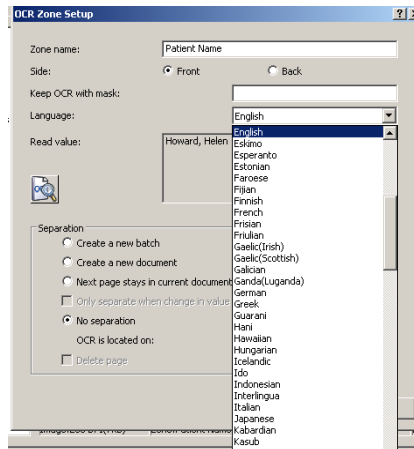
NOTE: The components of the Separation by Bar Code and Separation by OCR Zone window, icons and context-sensitive menu are described in detail in the sections entitled, "Bar Code, OCR & Mark Detection window" and "Bar Code, OCR & Mark Detection windows - context-sensitive menu" earlier in this chapter.

OCR indexing uses local language lexicons and allows reading of alphanumeric text at high speed (1000 characters/second). It is zonal (similar to bar code reading) and is processed during scanning.

Capture Pro Software supports the following text information for OCR:

- Ligatures ("joined" characters)
 - Broken characters
 - Degraded characters
 - Text from 200-600 dpi resolution
 - Text fonts from 8-72 points
 - Numbers from 0-9
 - Letters from A-Z and a-z
 - Symbols ! " \$ % & () * + , - . / : ; , < = > ? @ [\] { } £ • ß ´ ¨
- For best results, use 300 dpi resolution and 12-point sans serif font (or larger if using resolutions lower than 300 dpi). Do not use skewed documents.

- Capture Pro Software supports a wide range of languages for OCR indexing. To view a list of these languages:
 1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
 2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
 3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
 4. Click on any OCR zone and click **Zone Properties**. The OCR Zone Setup dialog box will be displayed.



5. Select the language of your text from the available languages on the *Language* drop-down list.

Scanning an image for OCR setup

Capture Pro Software allows you to separate scanned pages into batches and documents based on OCR zones. These OCR zones also allow you to create attachments to your documents.

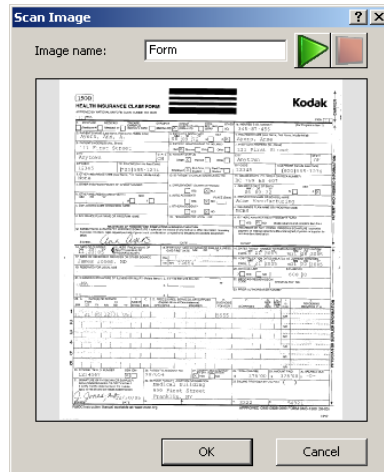
Before you can use OCR text as separators, you must:

1. Scan an image containing the OCR text into Capture Pro Software.
2. Create and define the OCR zones.
3. Set up your job for OCR zone separation.

To scan an image directly into the Separation by OCR Zone window:

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.

4. Position the original document in the feeder and click **Start/Scan**. The image will be displayed in the dialog box. Scan the image as straight as possible. Your scanner will use the parameters of the current Capture Pro Software page setup.



NOTES:

- Any settings from the current job setup will also be applied to the scanned image before it is displayed.
 - If the image is acceptable, enter a name in the *Image Name* field. The image name should not contain any of the following characters: : " ? * . < > \ / .
 - To discard the image, click **Cancel**.
 - Before you can define an OCR zone, you must have at least one image in the *Image* drop-down list.
 - You can transfer an image from the Image Viewer to the Separation by OCR Zone window. For more information, see "Transferring an image to the OCR window" later in this chapter.
5. Click **OK**.

Creating and selecting an OCR zone

Before you can use an OCR image to separate documents or batches, you need to create and select an OCR zone.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones** setting. The Separation by OCR Zone window will be displayed.
4. Select an image from the *Image* drop-down list. If you need to scan the image, click the green **Start/Scan** icon on the Separation by OCR Zone window.

NOTE: Place the mouse cursor at the top-left corner of the area of the displayed image where you want to define the location for this OCR zone. For variable length and height OCR indexing, make sure that you draw the zone large enough to capture all the indexing data. At the same time, be careful not to draw the zone so large that stray data (e.g., lines on a form) are accidentally captured.

OCR zones are job-specific as opposed to image-specific.

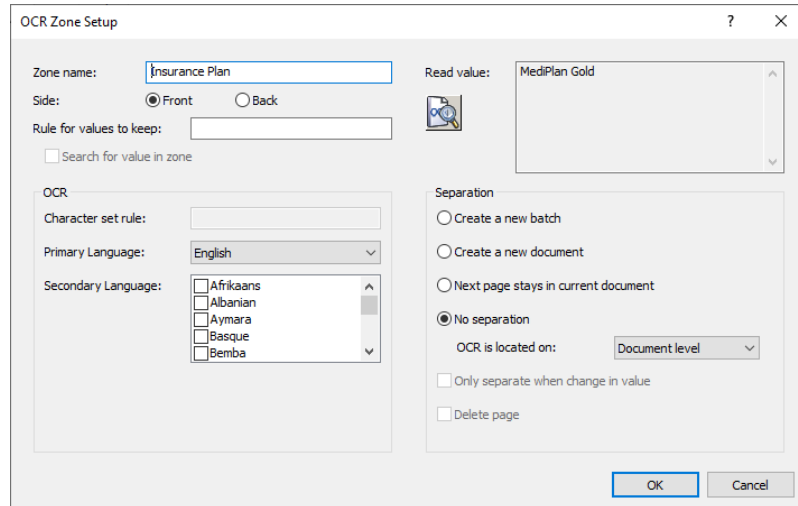
Therefore, displaying a new image will continue to display the zones you defined using earlier images.

5. Click the left mouse button and drag the cursor until a rectangle is drawn around the text area. After you release the cursor, the OCR Zone Setup dialog box will be displayed.
6. In the *Zone name* field, enter a name for the new OCR zone. You must create a name in order to save the zone.
7. After entering your other settings, click **OK** to close the dialog box and return to the Separation by OCR Zone window.
8. Click **OK** to save your settings and close the Job Setup dialog box.

OCR Zone Setup dialog box

OCR zones provide Capture Pro Software with information such as dimensions of the zone. After you draw an OCR zone, Capture Pro Software attempts to read the information in the zone and automatically displays the OCR Zone Properties window with whatever text the software could read in the zone.

NOTE: The OCR function has difficulty reading italic and underlined characters on Asian character sets. To increase the OCR reliability, it is recommended that you use black and white images.



Zone name—enter a name for the OCR zone. You must name the OCR zone in order to save it.

Side: Front or Back—select whether the OCR zone is located on the front or back of an image.

Rule for values to keep—any valid Input format text expressions may be entered or you can leave this field blank. If any Input format text expression is entered, then only OCR read strings that meet this rule will be kept. For example, if the expression entered is A<10>, then only OCR read strings containing 10 or less alpha characters will be kept. For more information see “Input formats” in Chapter 2.

Search for value in zone—when the **Rule for values to keep** is a fixed string format, then the OCR zone read value only needs to contain fixed strings for a value to be kept.

For example, if the **Rule for values to keep** was set to Form 1099, then the following read strings would be valid reads and batch/document separation would occur if selected.

“77644 Form 1099 - revision 1.2”

“81763 Form 1099 - revision 1.4”

“77644 Form 1099 - revision 2.2”

Character set rule—*not applicable at this time.*

Primary language—selecting the appropriate primary language ensures that Capture Pro Software properly OCR’s special language-specific characters (e.g., ç or ü). Use the drop-down list to display a list of supported languages.

Secondary language—one or more secondary languages may be selected when a zone may contain characters from more than one language.

Custom dictionary—a custom dictionary may be used to improve the accuracy of recognizing unique or unusual words that appear in your document set. Click **Browse** to select a custom dictionary.

Separation—the following options are available:

- **Create a new batch**: all images after the separation go into a new document in a new batch.
- **Create a new document**: all images after separation go into a new document in the current batch.
- **Next page stays in current document**: the next page after the separation remains in the current document.

No separation—select one of the following:

- **OCR is located on: Document level**: OCR zones located on the Document level and OCR zones that separate documents are available for document indexing. However, they are not available for batch indexing.
- **OCR is located on: Batch level**: OCR zones located on the Batch level and OCR zones that separate batches are available for both batch and document indexing.

Only separate when change in value—the system separates by document or batch only if a value changes.

Delete page—delete the page that contains the OCR read value that initiated the separation.

OK—closes the dialog box and returns to the Separation by OCR Zone window.

Applying OCR zones to specific pages

Separating documents with OCR zones

For information on how to select the page or pages to apply all the OCR zones, see “Zone Pages Setup dialog box” earlier in this chapter.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
4. Select an image from the *Image* drop-down list. If you need to scan the image, click the green **Start/Scan** icon on the Separation by OCR Zone window.

NOTE: Use your mouse to draw the OCR zone. The OCR Zone Setup dialog box will be displayed.

5. Under **Separation**, click the **Create a new document** option.
6. Click **OK** to exit the dialog box and return to the Separation by OCR Zone window.
7. Click **OK** to save your settings and exit the Job Setup dialog box.

NOTE: A Batch Header page exists whenever batch separation is defined using patch codes, bar codes or OCR zones (at least one zone in the job setup is configured for Batch separation).

Separating batches with OCR zones

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
4. Select an image from the *Image* drop-down list. If you need to scan the image, click the green **Start/Scan** icon on the Separation by OCR Zone window.
5. Use your mouse to draw the OCR zone. The OCR Zone Setup dialog box will be displayed. If you define an area on an image for OCR batch separation, that area should remain blank on all the other pages in the batch.
6. Under **Separation**, click the **Create a new batch** option.
7. Click **OK** to exit the dialog box and return to the Separation by OCR Zone window.
8. Click **OK** to save your settings and exit the Job Setup dialog box.

NOTE: Batch level OCR zones are only read when they are present on a Batch Header page. A Batch Header page exists whenever batch separation is defined using patch codes, bar codes or OCR zones (at least one zone in the job setup is configured for Batch separation).

For information about separating batches with color/grayscale scanning, see "Using separators when color scanning" later in this chapter.

Editing OCR zone properties

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job name from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
4. Click on the **OCR zone** that you want to change, or click on the OCR zone name in the list on the left side of the Separation by OCR Zone window.
5. Right-click the mouse button to display the context-sensitive menu and click **Zone Properties**. The OCR Zone Setup dialog box will be displayed.
6. After you change your settings, click **OK** to close the dialog box and return to the Separation by OCR Zone window.
7. Click **OK** to save your settings and exit the Job Setup dialog box.

After editing an OCR zone, test the OCR zone to verify that it is still readable.

Deleting an OCR zone

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
4. Click on the OCR zone that you want to delete. You can also click on the OCR zone name in the list on the left side of the Separation by OCR Zone window. The zone is highlighted.
5. Click **Delete**.
6. Click **OK**.

Transferring an image to the OCR window

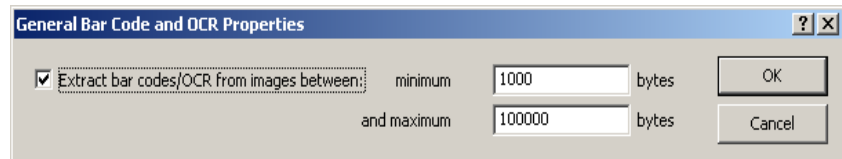
You can scan an image containing text for OCR directly into the Image Viewer and then transfer it to the Separation by OCR Zone window to create an OCR zone.

1. Scan your image containing the OCR text.
2. Locate the image in the Image Viewer and right-click on it.
3. Select **Copy image to job setup**. The Copy Image to Job Setup dialog box will be displayed.
4. Enter the new image name in the *Save image as* field.
5. Click **OK**.

Setting the range for OCR image size

Sometimes an OCR image is too small to be a readable image. You can set an image range size to exclude images that are too small.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR**. The Separation by OCR Zone window will be displayed.
4. Select any image and right-click on the OCR zone. The General Bar Code and OCR Zone Properties dialog box will be displayed.



NOTE: If an OCR zone does not exist, this option will not be available until a OCR zone is defined.

5. Check the **Extract bar codes/OCR from images between** checkbox and set a range for minimum and maximum byte size.
6. After you make your settings, click **OK** to close the dialog box and return to the Separation by OCR Zone window.
7. After editing an OCR zone, test your OCR zone to verify that it is still readable.

Creating an attachment with OCR zones

Creating attachments is useful in jobs where typically every page is a document (e.g., transaction documents, such as; checks, airline tickets, invoices, etc.), but there is occasionally a page (such as a corresponding memo) that needs to be appended to a document.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job name from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
4. Select an image from the *Image* drop-down list. If you need to scan the image, click the green **Start/Scan** icon on the Separation by OCR Zone window.
5. Using the cursor, define the OCR zone on the image where you expect to find the OCR text. The area defined for the OCR attachment should be blank on all other pages in the batch. The OCR Zone Setup dialog box will be displayed.
6. Under **Separation**, select **Next page stays in current document**. This option is only valid for one attachment page. If multiple attachments are required, then an attachment OCR zone must be applied to each attachment. The OCR zone on the attachment page is not available for indexing.
7. Check **Delete page** to delete the page (both front and rear) containing the OCR zone and to use the next page as the attachment. This is useful when inserts are applied indicating whether the next page is an attachment.
8. Click **OK** to save your settings and close the dialog box.

Testing OCR zones

When you define a new OCR zone from an image, Capture Pro Software automatically checks your zone to verify that it is readable. However, if you edit the OCR zone or change its properties later, it may no longer be readable. You can manually test your OCR zones to verify they are still readable.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Separation > By OCR Zones**. The Separation by OCR Zone window will be displayed.
4. Click the **Test All Bar Code, OCR & Mark Detection Zones** icon to test all OCR zones or click **Test Selected Bar Code, OCR & Mark Detection Zone** to test an individual OCR zone. The Bar Code, OCR & Mark Detection Values dialog box will be displayed.
5. After viewing the values, click **OK** to return to the Separation by OCR Zone window.
6. Click **OK**. If you make any changes to the OCR zone settings, test them again.

Using separators when color scanning

Capture Pro Software can scan color, grayscale, and black and white images with separators (bar code zones, OCR zones or patch codes). Images can be separated or mixed together. To separate these color/grayscale images quickly and reliably, Capture Pro Software uses their duplicate black and white images for reading the separators.

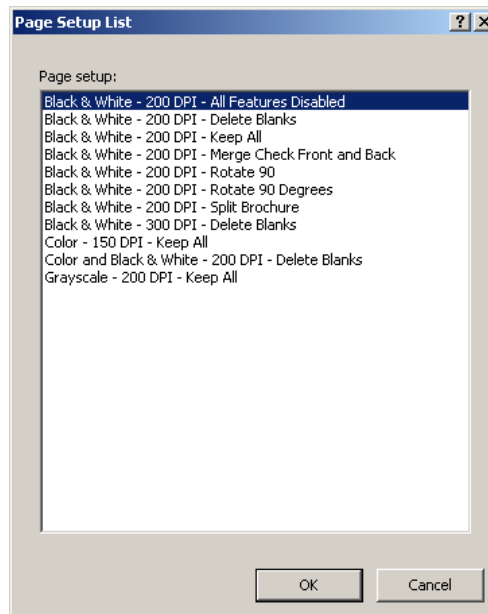
When scanning both color/grayscale and black and white images and the software detects a bar code zone, patch code or OCR zone, the software either deletes all four page images (color front, color back, black and white front, and black and white back) or attaches them to the new or current document or batch. This action will be determined by the settings in the Bar Zone Code Setup dialog box, Patch Code setup, or OCR Zone Setup dialog box.

When you are scanning only color/grayscale images, the software reads the duplicate black and white images. While these black and white images are never displayed or outputted, they are used for bar code reading, patch code reading and OCR indexing.

Setting up a color image for bar code/OCR zones

Capture Pro Software is capable of using color or grayscale images as a source for bar codes or OCR text. However, the performance and reliability of Capture Pro Software will be enhanced if you use a black and white image as a source.

1. Select **Capture>Page Setup List**. The Page Setup List dialog box will be displayed.



2. Select a simultaneous scanning page setup from the list (e.g., Color and Black & White - 200 DPI - Delete Blanks).
3. Place the color/grayscale original in the scanner and click the green **Start/Scan** icon. The images will be displayed in the Image Viewer.
4. Select the black and white image containing bar codes and OCR zones and click the right mouse button to display the Image context-sensitive menu.
5. Select **Edit>Copy Image** to Bar Code/OCR setup. The Copy Image to Job Setup dialog box will be displayed.
6. Enter the new image name in the text box and click **OK**.
7. Click **File > Job Setup**. The Job Setup dialog box will be displayed.
8. Open the Capture tab and select either **Separation > By Bar Code Zones** or **Separation By OCR Zones**. Depending on your selection, the Separation by Bar Code or Separation by OCR Zone window will be displayed.
9. The new image name will be displayed in the *Image* drop-down box. Follow the procedures for defining a bar code zone or OCR zone described in the previous chapter.
10. Click **OK**.

Bar Code and OCR Disclaimers

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Using Mark Detection zones

Mark Detection is a method of detecting the presence or absence of an ink mark within a specific area that is used to convey some intended information.

Good document design and clear instructions to respondents are very important in getting high accuracy. Printing model samples of ideally filled and filled-in-error checkboxes in the instructions is recommended. Respondents should be urged to fill in the document with a dark blue or black pen. Pencils are to be avoided, as are pens with an ink color close to a dropout color if the form is color is dropped during scanning.

Mark Detection setup allows you to define:

- The name of the Mark Detection zone.
- The physical location where you will find the mark (zone location on the image).
- The value when a mark is detected.
- The value when a mark is not detected.
- If the mark is contained within a frame such as a box or circle.
- The sensitivity to distinguish a mark due to random dirt or scratch “noise”.
- A group of mark detection zones to return a single set of values.

Use the Bar Code, OCR and Mark Detection Setup option on the Capture tab in the Job Setup dialog box to setup the mark detection parameters for one or more Mark Detection zones.

NOTES:

- Batch and document separation is not provided for Mark Detection zones.
- For best results, use 300 dpi resolution images.

Scanning an image for Mark Detection setup

Capture Pro Software allows you to capture and save the status of a mark area or a group of mark areas.

To use Mark Detection:

- Scan an image containing the mark areas into Capture Pro Software.
- Draw and select the mark detection zones.
- Setup optional groups of mark detection zones.

Capture Pro Software allows you to scan mark detection images directly into the Mark Detection window for viewing, defining and editing.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Bar Code, OCR and Mark Detection**. The Mark Detection window will be displayed.
4. Select the green **Start/Scan** button. The Scan Image dialog box will be displayed.
5. Position the original document in the feeder and click **Start/Scan**. The image will be displayed in the dialog box. Scan the image as straight as possible. Your scanner will use the parameters of the current Capture Pro Software page setup.

NOTES:

- Any auto-rotation, auto-cropping and deskew settings from the current setup will be applied to the scanned image before it is displayed.
 - If the image is acceptable, enter a name in the *Image name* field. The image name should not contain any of the following characters: : " ? . < > \ /.
 - To discard the image, click **Cancel**.
 - Before you can define a mark detection zone, you must have at least one image in the *Image* drop-down list.
 - You can also transfer an image from the Image Viewer to the Mark Detection window. See "Transferring an image to the Mark Detection window" later in this chapter.
6. Click **OK** to save the image.

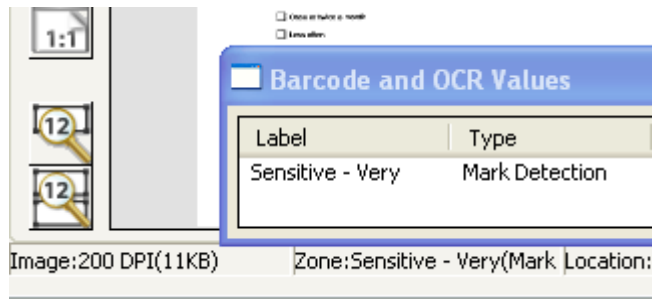
Creating and selecting a Mark Detection zone

Before you use a mark detection image for indexing, you need to create and select one or more mark detection zones. Mark detection zones are created to indicate where to look for a mark. Multiple mark detection zones may be grouped to populate a single index field.

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list and open the Capture tab.
3. Select **Bar Code, OCR and Mark Detection**. The Bar Code, OCR & Mark Detection window will be displayed.
4. Select an image from the *Image* drop-down list. If you need to scan an image, click the green **Start/Scan** icon on the Bar Code, OCR & Mark Detection window.
 - Place the mouse cursor at the top-left corner of the area of the image where you want to define the location for this mark detection zone.
 - When drawing a zone around a mark detection area that contains a frame for the mark (box, circle, ellipse, etc.) leave a border area of approximately 1/4-inch around the frame.
 - When drawing a zone around a mark detection area that does not contain a frame (a blank area or line is provided for the mark) make sure that characters or other elements of the image are not in the zone.
5. Click the left mouse button and drag the cursor until a rectangle is drawn around the mark area. After you release the cursor, the Mark Detection Zone Setup dialog box will be displayed.
6. In the *Zone name* field enter a name for the new mark detection zone. You must create a name in order to save the zone.
7. After entering your other settings, click **OK** to close the dialog box and return to the Mark Detection window. See "Mark Detection Zone Setup dialog box" for field descriptions.
8. Click **OK** to save your settings and close the Job Setup dialog box.

Editing a mark detection zone

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Bar Code, OCR & Mark Detection**. The **Bar Code, OCR & Mark Detection Zone** window will be displayed.
4. Click on the mark detection zone that you want to change.
5. Right-click the mouse button to display the context-sensitive menu and click **Zone Properties**. The Mark Detection Zone Setup dialog box will be displayed.
6. After you change your settings, click **OK** to close the dialog box.
7. Click **OK** to save your settings and close the Job Setup dialog box.
8. After editing a mark detection zone, test the mark detection zone using the *Test Selected Bar Code, OCR or Mark Detection zone* function.



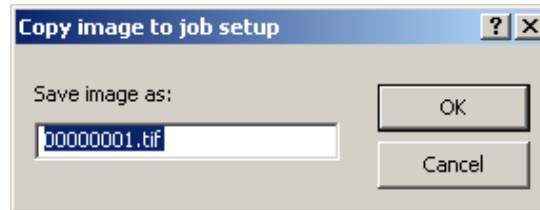
Deleting a mark detection zone

1. Select **File > Job Setup**. The Job Setup dialog box will be displayed.
2. Select a job setup from the *Job Name* drop-down list.
3. Open the Capture tab and select **Bar Code, OCR & Mark Detection**. The Bar Code, OCR & Mark Detection Zone window will be displayed.
4. Click on the mark detection zone that you want to delete.
5. Click **Delete**.
6. Click **OK** to save your settings and close the Job Setup dialog box.

Transferring an image to the Mark Detection window

Capture Pro Software allows you to transfer an image containing mark detection zones from the Image Viewer into the Mark Detection window for creating mark detection zones.

1. In the Main window, scan your image containing the mark or marks.
2. Locate and right-click on the image you want to transfer in the Image Viewer.
3. Select **Copy Image to Job Setup**. The Copy Image to Job Setup dialog box will be displayed.

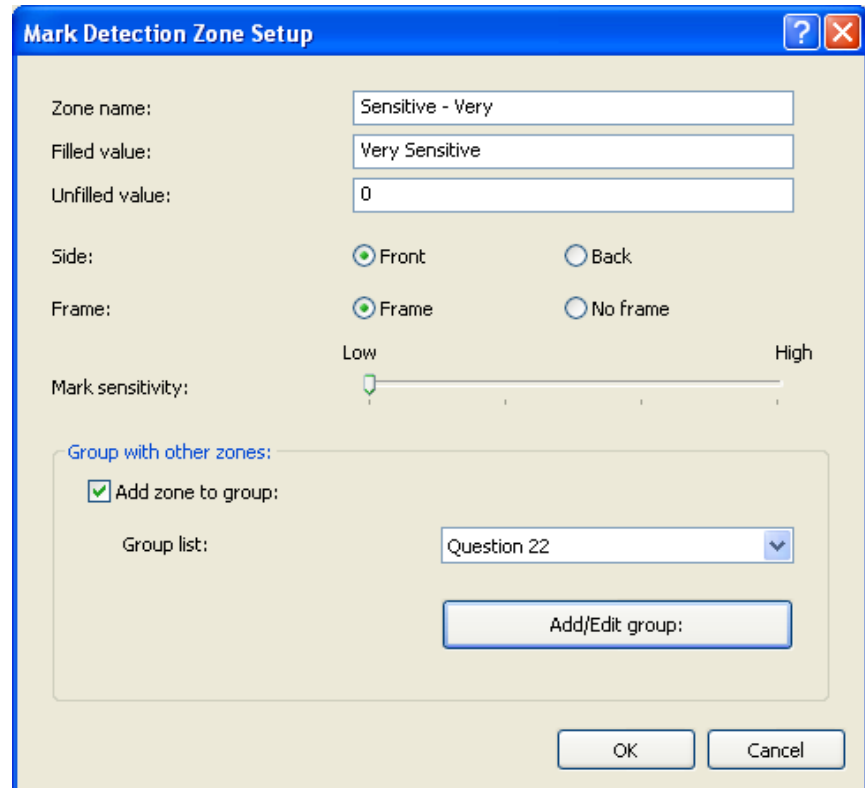


4. Enter the new image name in the *Save image as* field.
5. Click **OK**. You can now view the image in the Mark Detection window and use it to create a mark detection zone.

You can also directly scan mark detection images into the Mark Detection window. See “Scanning an image for Mark Detection setup” earlier in this chapter.

Mark Detection Zone Setup dialog box

Use this dialog box to name your mark detection zone, describe how the mark is detected and optionally group multiple zones to produce a single result.



The dialog box is titled "Mark Detection Zone Setup" and contains the following fields and controls:

- Zone name:** A text box containing "Sensitive - Very".
- Filled value:** A text box containing "Very Sensitive".
- Unfilled value:** A text box containing "0".
- Side:** Two radio buttons: "Front" (selected) and "Back".
- Frame:** Two radio buttons: "Frame" (selected) and "No frame".
- Mark sensitivity:** A slider control ranging from "Low" to "High", with a green indicator at the "Low" end.
- Group with other zones:** A section containing:
 - A checked checkbox labeled "Add zone to group".
 - A "Group list:" label next to a dropdown menu showing "Question 22".
 - An "Add/Edit group:" button.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Zone name—enter the name for your new mark detection zone. This name identifies the mark area and appears in the Index setup as MD_(zonename) in the list of default values.

Filled value—the zone will return this value when it is detected to be “filled”. The value may be a single value such as “1” or a multi-character value such as “This checkbox was marked”. The value may also be left empty.

If the zone is added to a group of mark detection zones, this value is included in the value returned by the zone group. See “Mark Detection Zone Group Setup” later in this section.

Unfilled value—the zone will return this value when it is detected to be “unfilled” or empty. The value may be a single value such as “0” or a multi-character value such as “This checkbox was not marked”. The value may also be left empty.

If the zone is added to a group of mark detection zones, this value is not used. The unfilled value returned by a group of zones is defined in the group setup. See “Mark Detection Zone Group Setup” later in this section.

Side: Front or Back—select whether the mark area is located on the front or back of an image.

Frame: Frame or No Frame—a frame can be a rectangle, a circle, an ellipse, etc.; in which the mark is expected to be placed. The dimensions of the frame should be at least 50 pixels in each direction, 4 mm (0.2 inch) in the case of 300 dpi resolution.

- If **Frame** is selected, it may be filled in by any shape such as an X, a tick, non-solid hatching, horizontal or vertical lines, etc. The recommended filling shape is an X or a tick. A small number of contiguous black pixels within the frame area will lead to a value of “filled” for the mark detection zone.
- If **No Frame** is selected, then any mark of several contiguous black pixels will lead to a value of “filled” for the mark detection zone. If the form contains frames for the mark but the frame will be color dropped then the **No Frame** option should be selected.

Mark sensitivity: Low to High—for well-printed, high quality forms, the sensitivity should be set to **High**. When **High** is selected, small marks of just a few contiguous black pixels will lead to a value of “filled”. For poor quality forms, a lower sensitivity will allow speckles or visible paper fibers to be ignored resulting in successful processing.

Add zone to group—select this option if this mark detection zone is associated with other mark detection zones and a single result is desired for the group of associated zones. For example, a form presents a question with three check boxes, “Like”, “Dislike” and “Do not care”. Three mark detection zones are defined, one for each possible response. All three mark detection zones would have this option selected and be added to the same group.

Applying mark detection zones to specific pages

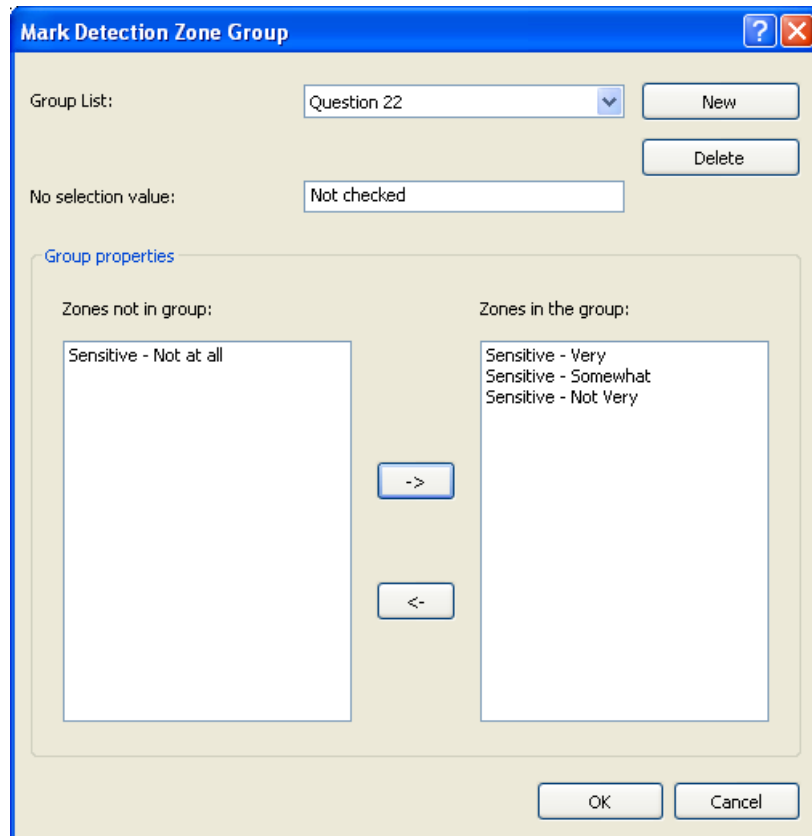
For information on how to select the page or pages to apply all the mark detection zones, see “Zone Pages Setup dialog box” earlier in this chapter.

Mark Detection Zone Group Setup

For each expected mark on a page, a mark detection zone is created and configured as described in the section entitled, “Mark Detection Zone Setup”. Each mark detection zone will return a value depending on if the mark area is “filled” or “unfilled”. This works well for simple “Yes” or “No” questions. For a question with multiple possible responses, where a single response is desired, the mark detection zones may be “grouped”.

For example, the question, “When traveling by air, what is your seating preference?” may have three possible responses, “Aisle”, “Window” or “Do not care”. Three mark detection zones would be created, one for each of the three possible responses. The three mark detection zones would all be added to a new mark detection group. A single index field would be created for the response to this question and the mark detection group would be used as the default value for the index field. See “Adding a document index field” in Chapter 2.

To add a mark detection zone to group:



1. Select **Add zone to group**. A list of existing mark detection groups will be displayed. Select the group in which you want to add this mark detection zone.
 - If there is no existing mark detection group, the Create New Zone Group dialog box will be displayed.
 - Enter a name for the new group and click **OK**.

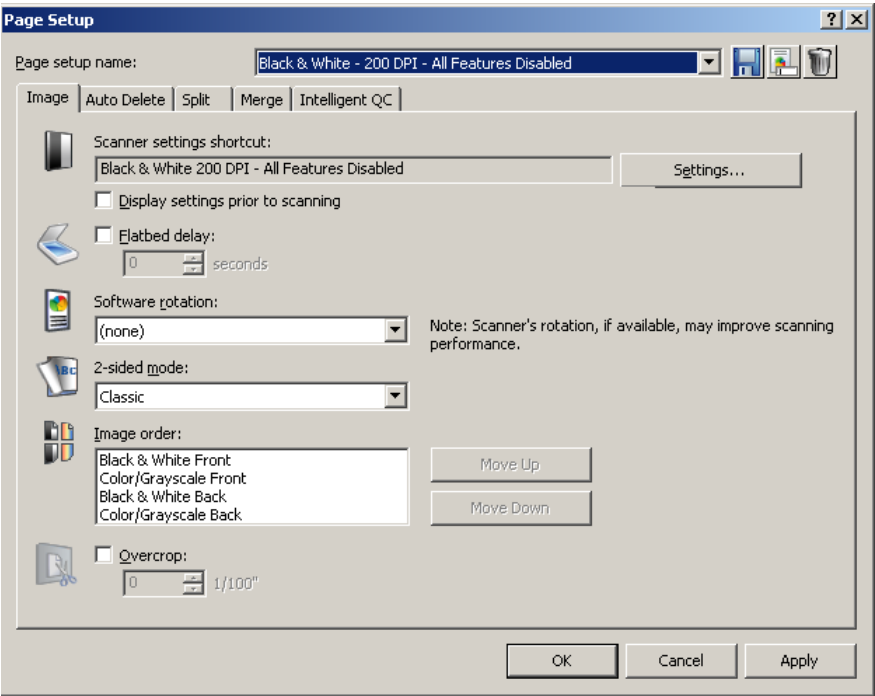
2. Select **Add/Edit Group**. The Mark Detection Zone Group dialog box will be displayed.
 - **Group List**—shows the name of the current mark detection group. Click the drop-down list to display other mark detection groups.
 - **No selection value**—the group will return this value if no mark is detected in any of the mark detection zones within the group. The value may be a single value such as “0” or a multi-character value such as “No selection”. The value may also be left empty.
 - **Group properties**—using the -> button, select and move the mark detection zones that you want to include in the group, from the *Zones not in group* list to the *Zones in the group* list.
3. Using the <- button, select and move the mark detection zones that you do not want to include in the group, from the *Zones in the group* list to the *Zones not in group* list.
4. Click **OK**.

5 Page Setup

Page Setup dialog box

Use the Page Setup dialog box to define image scanning parameters, automatically delete images, split images or merge images.

To access Page Setup click **File > Page Setup**.



Page setup name—select an existing Page Setup from the drop-down list.

Icons

	Add: displays the Save As dialog box, which allows you to add a new page setup.
	Rename: displays the Rename dialog box which allows you to rename the currently selected page setup.
	Delete: displays a confirmation box which allows you to delete the selected page setup.

Image tab—allows you to define the way images will be displayed after scanning.

Auto Delete tab—allows you to automatically delete a scanned image if it exceeds the settings entered on this tab.

Split tab—allows you to automatically split a scanned image if it exceeds a certain width.

Merge tab—allows you to merge the front and back images of a scanned page into a single image.

Intelligent QC tab—allows you to setup the following options to be applied during image processing: auto-orientation, binarize and hole fill.

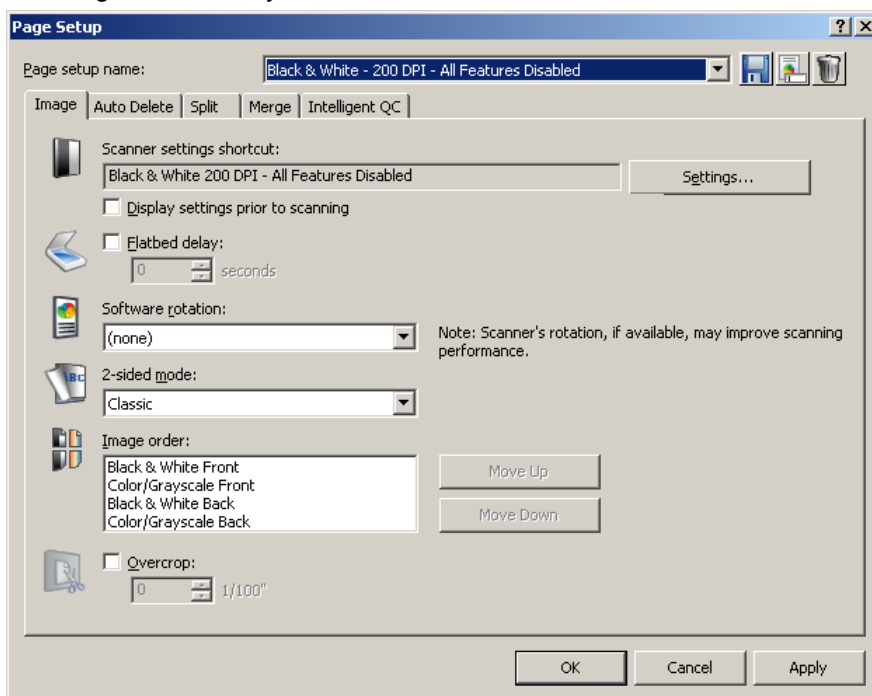
OK—saves your settings and closes the dialog box.

Cancel—closes the dialog box without saving any changes.

Apply—accepts the changes made in the dialog box without closing the dialog box.

Image tab

The Image tab allows you to set up scanning parameters and make changes to your images before they are stored.



Settings—when you click **Settings**, the TWAIN Datasource will be displayed allowing you to configure your scan settings. For more specific scanner information, see the User's Guide for your scanner.

Display settings prior to scanning—opens the TWAIN Datasource after you click the green **Start/Scan** icon.

Flatbed delay—sets a timed delay between scans so the operator can open a different page on a book or magazine and place it back on the flatbed. Select the number of seconds for the delay from the drop-down list.

Software rotation—automatically rotates the image after scanning. Select **None**, **90**, **180** or **270** degrees. As you enter a different setting, the icon will display how the image would look after rotation.

NOTE: Setting up this rotation in the TWAIN Datasource may yield better scanning performance than using Software rotation on the Image tab.

2-sided mode—select **Classic** or **Calendar** mode from the drop-down list for two-sided scanning and the corresponding icon will be displayed. Compare your original image with the icon to determine if it has a classic or calendar layout.

- **Classic**: typically used for multi-page reports. The **2-sided mode** option only influences the way the front image is rotated in relation with the back image. It does not set the overall rotation of the document (0°, 90°, 180° or 270°).

When using **Classic: 2-sided mode**, the front and rear images correspond as follows:

A 0° rotated front results in a 0° rotated back.

A 180° rotated front results in a 180° rotated back.

A 90° rotated front results in a 270° rotated back.

A 270° rotated front results in a 90° rotated back.

- **Calendar**: typically used for presentation handouts, financial reports, wall calendars, etc. The **2-sided mode** option only influences the way the front image is rotated in relation with the back image. It does not set the overall rotation of the document (0°, 90°, 180° or 270°).
- When using the **Calendar: 2-sided mode**, the front and rear images correspond as follows:
 - A 0° rotated front results in a 180° rotated back.
 - A 180° rotated front results in a 0° rotated back.
 - A 90° rotated front results in a 90° rotated back.
 - A 270° rotated front results in a 270° rotated back.

Image order—select an image and use **Move Up** or **Move Down** to change the image order listed in the box.

Overcrop—enable this checkbox to trim all edges of the image by the amount you specify in 1/100ths of an inch.

OK—saves your settings and closes the dialog box.

Cancel—closes the dialog box without saving any changes.

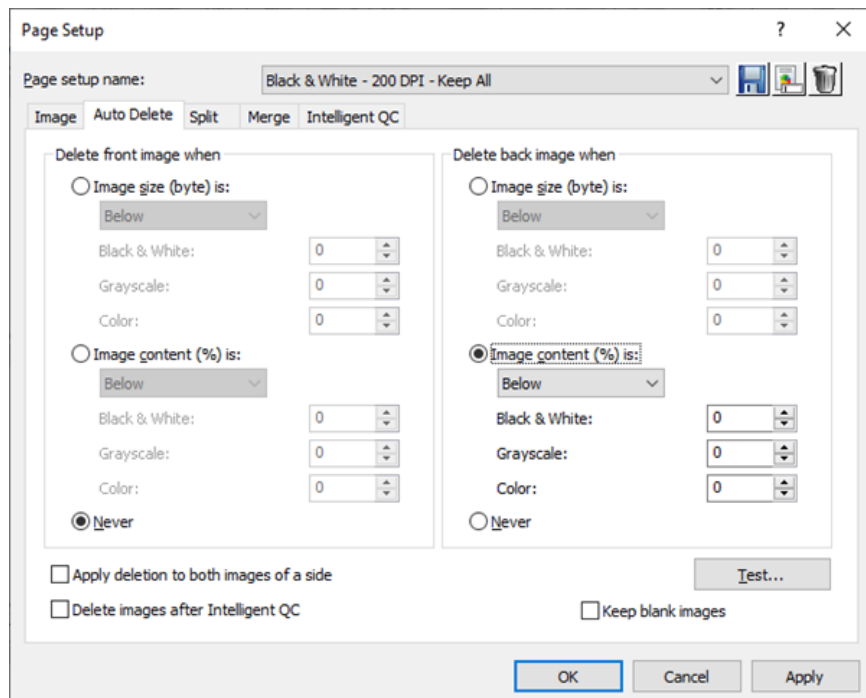
Apply—accepts the changes made in the dialog box without closing the dialog box.

Auto Delete tab

The Auto Delete tab allows you to set options for automatically deleting an image. You may want to delete images with no content, or possibly very busy pages (e.g., the back of a form which has a lot of explanatory text on it). Auto deletion settings are specified independently for front and back images.

If you are doing simultaneous scanning of color, grayscale and/or black and white image types, auto deletion settings are also set independently. Therefore, you can choose to delete only the selected image type.

When using Auto Delete, it is recommended that you scan some representative documents which you would want to delete by using the **Test** option. The results of the Test option will help you determine if you should set the auto delete values using the **Image size (byte) is** option or the **Image content (%) is** option. For more information see “Testing your settings”.



- **Image size (byte) is Above**—select this option if you want to delete pages with a lot of busy, explanatory content on them. For example, if you are scanning documents with similar content (e.g. insurance forms) on the front and back page, and the front page has content you need to keep, but the back page contains instructions on how to file a claim (that you do not need to keep), enter the number of bytes that you want Capture Pro Software to delete any image file greater than that amount. Any image that is more than this value will be considered too large and will be deleted.
- **Image size (byte) is Below**—select this option if you want to delete pages with no content or very little content. Enter the number of bytes that Capture Pro Software will consider the image size to be blank. Any image that is less than this value will be considered blank and will be deleted.

- **Image content (%) is Above**—this option is similar to the **Image size (byte) Above** option except that you enter a percentage value that Capture Pro Software will consider the image to have too much content. Any image more than this will be deleted.
- **Image content (%) is Below**—this option is similar to the **Image size (byte) Below** option except that you enter a percentage value that Capture Pro Software will consider the image to be blank or too little content. Any image that is less than this value will be considered blank and will be deleted. Use this setting when there are blank pages.

NOTES:

- When selecting the **Image size (byte)** option, other factors such as resolution, compression, etc., will impact the image size.
- The **Image content (%)** option only looks at the percentage of information on the image and therefore, is a more consistent and dependable option to use when images may vary in size, resolution, compression, etc.

Never—click **Never**, if you do not want the software to delete any images automatically.

Apply deletion to both images of a side—deletes both the black and white and color/grayscale images.

Delete images after Intelligent QC—select this option if you want to selected Intelligent QC image processing functions to operate on an image before it is deleted. For example, you may want to create a grayscale image from a color image before deleting the color image.

Test—displays the Test Image dialog box, which allows you scan a sample image and test your settings.

OK—saves your settings and closes the dialog box.

Cancel—closes the dialog box without saving any changes.

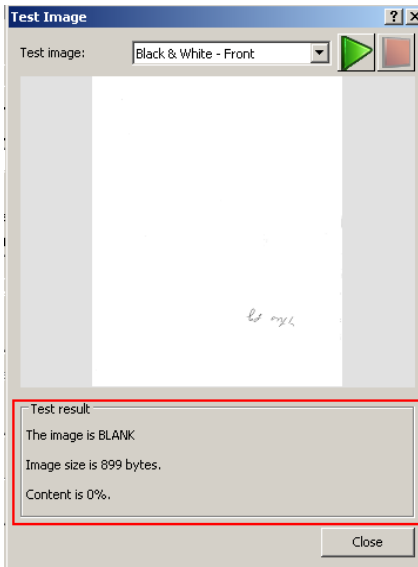
Apply—accepts the changes made in the dialog box without closing the dialog box.

Keep blank images — when this option is enabled (checked), blank images are highlighted rather than deleted.

Testing your settings

The Test Image dialog box allows you to test your images to determine whether or not they meet your deletion settings. It is highly recommended that you test your settings to be sure that the images you want to be deleted are deleted and that you keep the images you want to keep.

1. Click **Test** on the Auto Delete tab to display the Test Image dialog box.



2. Place some documents in the scanner that are representative of the documents you want to test for auto deletion.
3. Before you scan a page, select **Black and White - Front, Black and White - Back, Color - Front, or Color - Back** from the drop-down list.

NOTE: The options that are displayed in the drop-down list are dependent upon your Page Setup.

4. Click the **Start/Scan** icon. The results will be displayed in the Test result box.
 - **The image is:** indicates if the image is **Blank** or **Not Blank**.
 - **Image size is - (bytes):** the size of the test image in bytes.
 - **Content is - %:** the percentage of content in the test image.
5. Evaluate the values displayed in the **Image size is - (bytes)** and/or **Content is - %** Test results box.

NOTE: Based on the value displayed in the Test results box you may want to enter a value slightly *lower* or slightly *higher* than the displayed value depending on the desired output. For example, if your representative image byte size of blank images is 799 bytes and almost blank images is 900 bytes, you may want to enter a value of 850 bytes in the *Image size is - (bytes)* field on the Auto Delete tab.

6. Click **OK**.

NOTE: During the test image scan, options to Split and Merge will be ignored.

Splitting images

Splitting images is frequently used in forms processing. When scanning folded forms, you may want them to be split in several smaller images to make forms registration and verification more reliable. Capture Pro Software splits the images, sorts the images, and extracts data from the images in the correct sequence.

The split occurs only on pages that comply with a minimum and maximum width expressed in 1/100ths of an inch. The split operation is a vertical split, meaning that the page is divided into equal left, middle, and right portions (if splitting three ways). The split occurs after rotation. When scanning large forms that cannot be scanned in landscape mode because they are wider than the scanner transport, rotation is required.

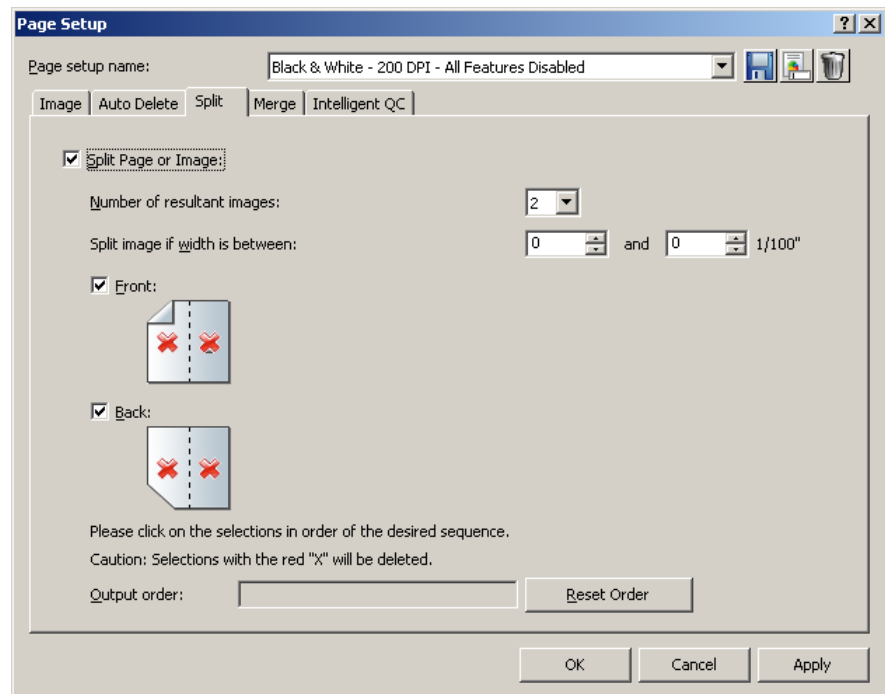
Set the **Software rotation** option on the Image tab of the Page Setup dialog box depending on how you scan the document.

After the split, odd-numbered images will be considered front images and even-numbered images will be considered rear images. Because Capture Pro Software immediately shows the result after merging or splitting, you can test your page setup and make changes if necessary.

If you are scanning one-sided images (or when you are scanning from the flatbed), the split will occur only on the front image.

Splitting an image

To split images during scanning:



1. Click the **Split Page or Image** checkbox.

NOTE: The Merge and Split options cannot be active at the same time. To disable the Merge option, open the Merge tab and uncheck the **Merge front and back into one single image** checkbox.

2. Choose from 2 to 12 images in the *Number of resultant images* drop-down list.
3. Select a range of widths for the page or image from the *Split image if width is between* field. If the page width falls within this range, it will be split. If either the front or back side falls outside the range, neither side will be split.
4. Select **Front** and/or **Back** to activate a split. A graphic will be displayed showing your selection. For example, if you enable both checkboxes, the icons will appear with a red "X" on each page.

Click on each image segment in the order you want the images to be output. As you click on an image segment, the red "X" disappears.

Any image segment that is still marked with a red "X" will be deleted and not sent to output. This option might be useful for the last page of a pamphlet that is always blank.

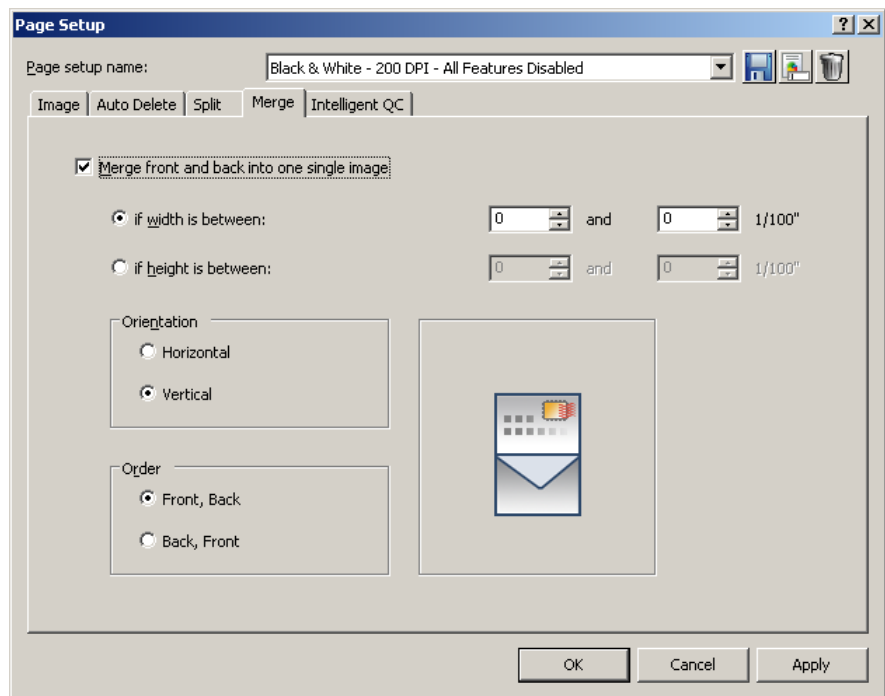
NOTE: When using a simplex-only scanner, selecting both **Front** and **Back** will result in no split. Select **Front** only to cause a split.

5. If desired, click **Reset Order** to delete the output order and start again.
6. Click **OK** to save your settings and close the Page Setup dialog box.

Merge tab

To merge images during scanning:

1. Click the **Merge front and back image into one single image** checkbox.



NOTE: The Merge and Split options cannot be active at the same time. To disable the Split option, open the **Split** tab and uncheck the **Split Page or Image** checkbox.

2. Set the minimum and maximum image widths and heights in 1/100ths of an inch for front and back images to be merged in the *if width is between* and the *if height is between* fields. Capture Pro Software merges only the images that meet these parameters. Any other images are not merged.
3. Click **Horizontal** or **Vertical** for the desired orientation on the merged image.
4. Click **Front, Back** or **Back, Front** for the desired order of the front and back on the merged image.
5. Click **OK** to save your settings and close the Page Setup dialog box.

Intelligent QC tab

The Intelligent QC tab of the Page Setup dialog box allows you to set up these image processing functions during image capture:

- Auto-orientation
- Binarize
- Create Grayscale from Color
- Hole fill
- Auto crop
- Deskew

Auto-orientation

Auto-orientation analyzes the content of your documents and orients each document so it is right-reading. You can select **Orient Front**, which orients the front side of a page or **Orient Back**, which orients the back side of a page.

Binarize

Binarize converts color or grayscale images to black and white. Your scanner must be setup to scan color or grayscale. While scanning, the image will be converted to black and white and checked for noise. If excessive noise is detected, the image will be flagged and you will have an opportunity after scanning to adjust the image to enhance the desired content.

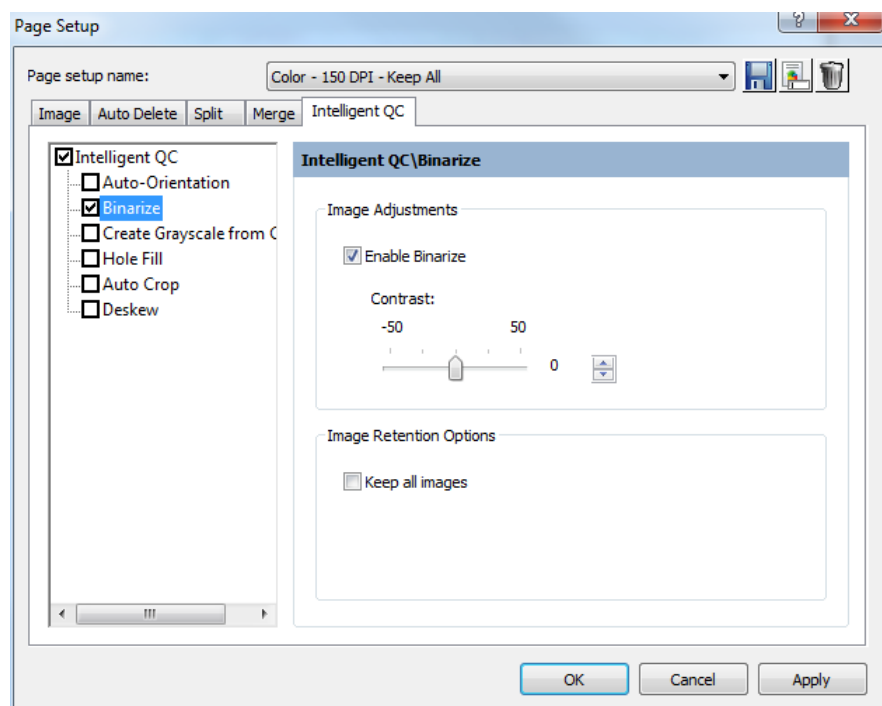


Image Adjustments

- **Enable Binarize**—check this option to adjust the **Contrast**.
 - **Contrast**: sets the contrast for each image. If your document set contains images with faint text or colored / dark backgrounds then you may wish to increase the contrast.

If your documents are light weight paper and content on the back side is visible on the front then decreasing the contrast may produce better results. In many cases a contrast of 0 will produce the best result.

Image Retention Options

- **Keep all images**—by default, only the flagged color or grayscale images will remain in the batch with the black and white images and only these images may be modified after scanning. Select this box if you want to keep all the color or grayscale images so that you can modify any image sent from the scanner, whether they are flagged or not.

NOTES:

- When using a Kodak Scanner or Alaris Scanner with **Thresholding - Intelligent QC** enabled, the grayscale image will only be available for those images identified by the scanner as containing excessive noise.
- Selecting **Keep all images** will not result in auto deleted images being kept.
- If you do not want to keep the color or grayscale images after output, then only select the **Black and White** checkbox on the Output tab of Job Setup.

Create Grayscale from Color

Create Grayscale from Color will create a grayscale image for every color image sent from the scanner. Both the color and grayscale image will be added to the batch. There is no configuration required.

Hole fill

Hole fill will fill round or rectangular holes found near the edge of the page.

The scanner background must be black. You can select **Fill Front**, which fills holes found on the front side of a page, or **Fill Back**, which fills holes found on the back side of a page.

Auto crop

Auto crop will crop the scanned image to remove the background border that may appear at the end of the image. It is recommended that you use the Auto crop feature of your scanner if available. There is no configuration required.

Deskew

Deskew will correct minor rotation or skew of an image. When selected, Auto crop will be automatically selected. There is no configuration required.

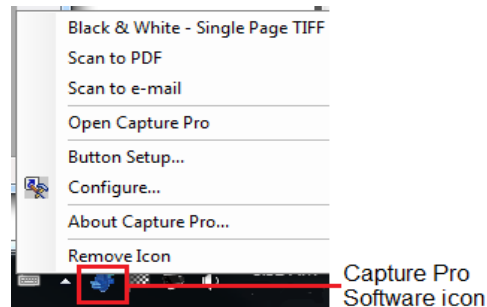
6 Productivity Shortcuts

Button Manager

When scanning shortcuts have been created, you can assign each shortcut name to a particular value for the Scanner button (if your scanner has buttons). You can assign up to 9 buttons. Once the numbers are assigned, you can quickly access and use these scanning options by using the Start button on the control panel.

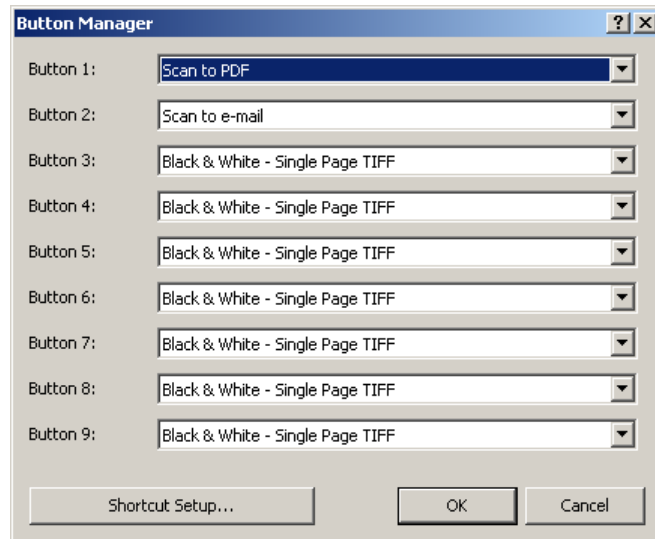
To access the Button Manager dialog box:

1. Right-click on the Capture Pro Software icon in the system tray and select **Button Setup**:



The Button Manager dialog box will be displayed.

2. Assign **Buttons 1 through 9** as desired by select the action you want the scanner to take from the drop-down list. The default is no action.



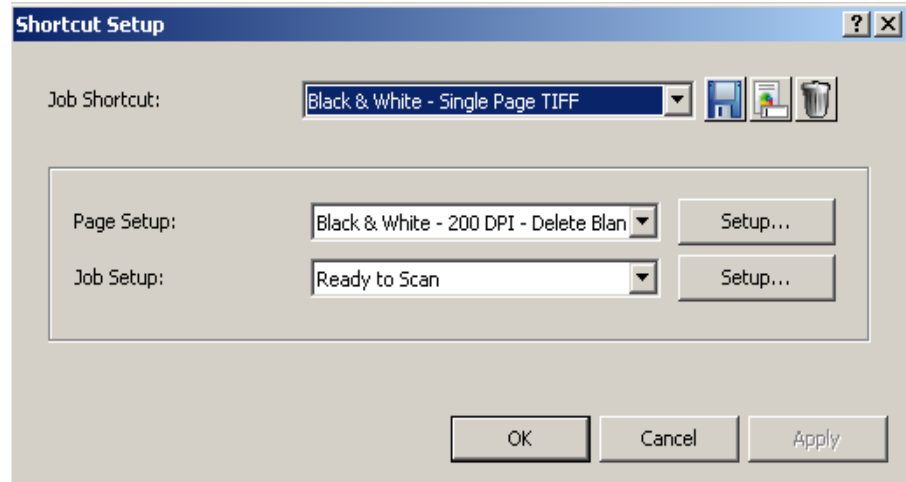
3. Click **Shortcut Setup** to display the Shortcut Setup dialog box which allows you to assign a Job Shortcut name, Page Setup and Job Setup.
4. Click **OK**.

NOTE: If you experience any issues with the Button Manager, review the Frequently Asked Questions in *Chapter 9, Troubleshooting*.

Shortcut Setup dialog box

When you select **Shortcut Setup** from the Button Manager dialog box, the Shortcut Setup dialog box will be displayed. This dialog box allows you to create a new job shortcut, and rename or delete the currently selected job shortcut. You can also use this dialog box to select or change the page and job setups associated with it.

NOTE: Assigning shortcuts to scanner buttons is not supported by Button Manager.



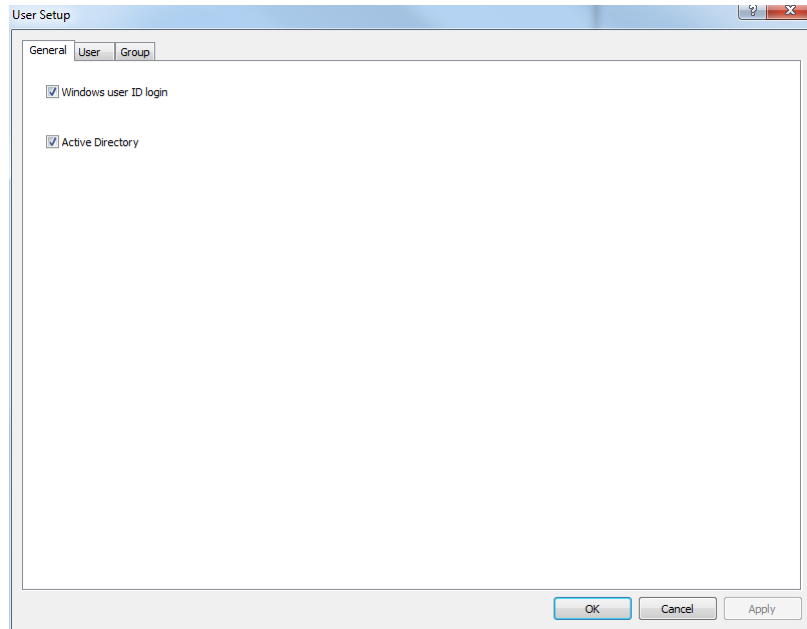
1. Select the desired Job Shortcut name from the drop-down list. You can also use the icons to add, rename or delete a job shortcut.
 - **Add:** displays the Save As dialog box which allows you to add a new job shortcut.
 - **Rename:** displays the Rename dialog box which allows you to rename the currently selected job shortcut.
 - **Delete:** displays a confirmation box which allows you to delete the selected job shortcut.
2. If desired, select a page setup from the *Page Setup* drop-down list or click **Setup** to display the Page Setup dialog box and create a new page setup.
3. If desired, select a job setup from the *Job Setup* drop-down list or click **Setup** to display the Job Setup dialog box and create a new job setup.
4. Click **OK**.

7 User and Group Setup

User Setup dialog box

The User Setup dialog box allows you to set up and manage users of Capture Pro Software. The user setup functions can only be set by individuals with Capture Pro Software administrator access.

To access User Setup, select **File > User Setup**. The User Setup dialog box will be displayed.



The User Setup dialog box has three tabs: General, User and Group.

General tab

The General tab allows you bypass the login function for a user by checking the **Windows user ID login** checkbox.

If you want to authenticate users with your Active Directory Server, click the **Active Directory** checkbox.

Setting up users and groups using Active Directory

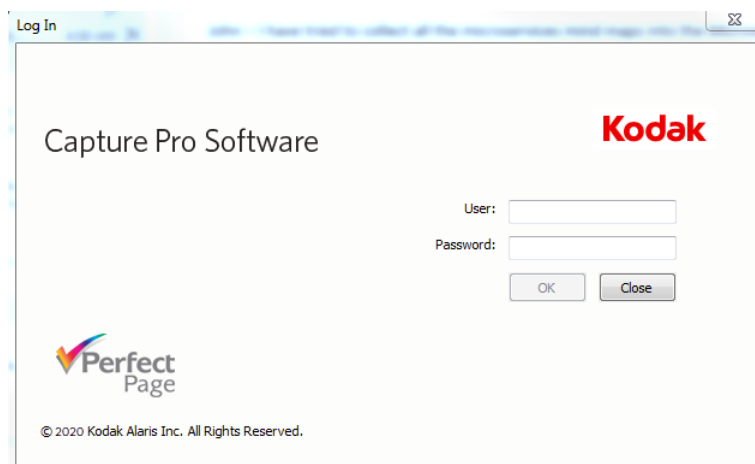
When **Active Directory** is checked and a new user logs in, Capture Pro Software will check each Active Directory group that the user is a member to find a match to a Capture Pro Software group. The new user will be added to the first Capture Pro Software group that matches a user's Active Directory group.

If no matching group is found, the new user will still be added to Capture Pro Software and a new group based on one of the user's Active Directory groups will be created in Capture Pro Software. By default, the new group will have no permission or Jobs in Capture Pro Software. A Capture Pro Software user with permission to modify the User Setup will need to enter User Setup and either assign the new group permissions and Jobs or assign the new user to an existing Capture Pro Software group.

If a new user is not a member of any Active Directory group, the user will receive a warning message when first logging in that they must be a member of at least one group.

It is recommended that the Capture Pro Software system administrator (sysadmin) add the appropriate groups to Capture Pro Software before users login the first time. The group name entered into Capture Pro Software must match the group name defined in the Active Directory.

When users are logging into Capture Pro Software, the User name must include the domain. For example domain\UserID.

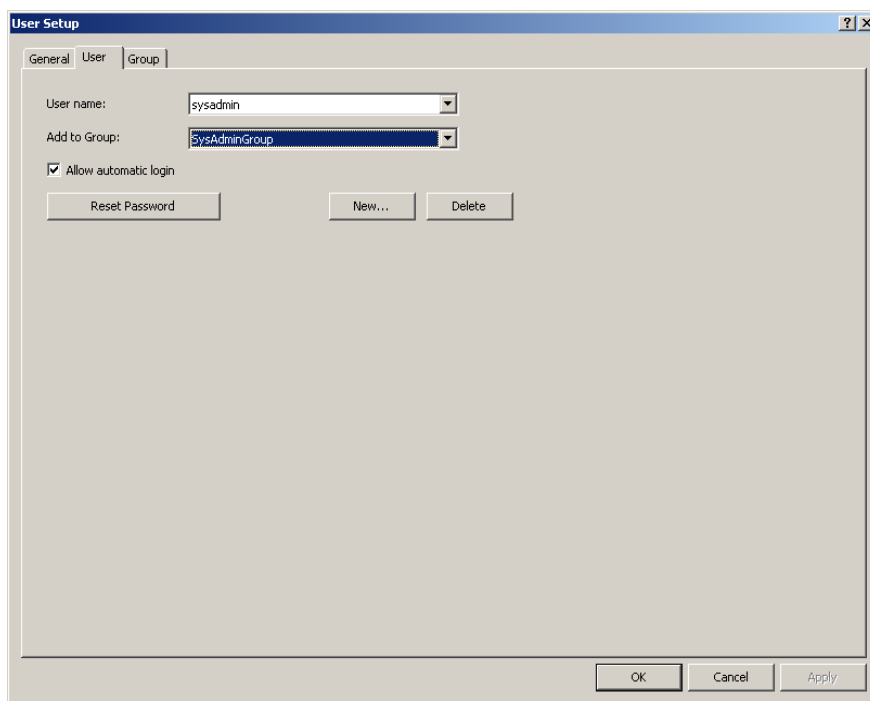


User tab

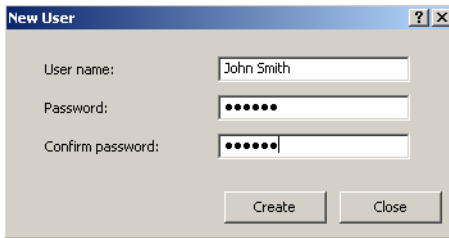
Users and user groups can be configured in Capture Pro Software to limit access to specific jobs and Capture Pro Software functions.

Adding a new user

1. Select **File > User Setup**.
2. Open the **User** tab.



3. Click **New**. The New User dialog box will be displayed.

A dialog box titled "New User" with a blue header bar containing a question mark icon and a close button. The dialog has three text input fields: "User name:" with the text "John Smith", "Password:" with seven dots, and "Confirm password:" with seven dots. At the bottom are two buttons: "Create" and "Close".

4. Enter the name of the user in the *User name* field.
5. Enter a password for this user in the *Password* field.
6. Re-enter the password in the *Confirm password* field and click **Create**. This user is automatically added to the list.

NOTE: The user can change this password by selecting **File > Change Password**.

Adding a user to a group

1. Select **File > User Setup** and open the **User** tab. The User Setup dialog box will be displayed.
2. Select a user name from the *User name* drop-down list.
3. Select a group name from the *Add to Group* drop-down list.
4. Check **Allow automatic login** if you want to bypass the login function for Capture Pro Software and automatically login this user when Capture Pro Software is launched.

NOTE: If you want to login as another user, select **File > Logout** and then login as the new user.

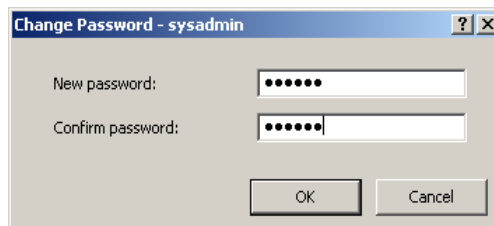
5. Click **OK**.

Deleting a user

1. Select **File > User Setup** and open the **User** tab. The User Setup dialog box will be displayed.
2. Select the user you want to delete from the *User name* drop-down list.
3. Click **Delete**. A confirmation box will be displayed.
4. Click **Yes** to complete the deletion.
5. Click **OK**.

Resetting a password

1. Select **File > User Setup** and open the **User** tab. The User Setup dialog box will be displayed.
2. Select the user you want to reset a password for from the drop-down list.
3. Click **Reset Password**. The Change Password - sysadmin dialog box will be displayed.

A dialog box titled "Change Password - sysadmin" with a blue header bar containing a question mark icon and a close button. The dialog has two text input fields: "New password:" with seven dots and "Confirm password:" with seven dots. At the bottom are two buttons: "OK" and "Cancel".

4. Enter a new password in the *New password* field.
5. Re-enter the password in the *Confirm password* field.
6. Click **OK**.

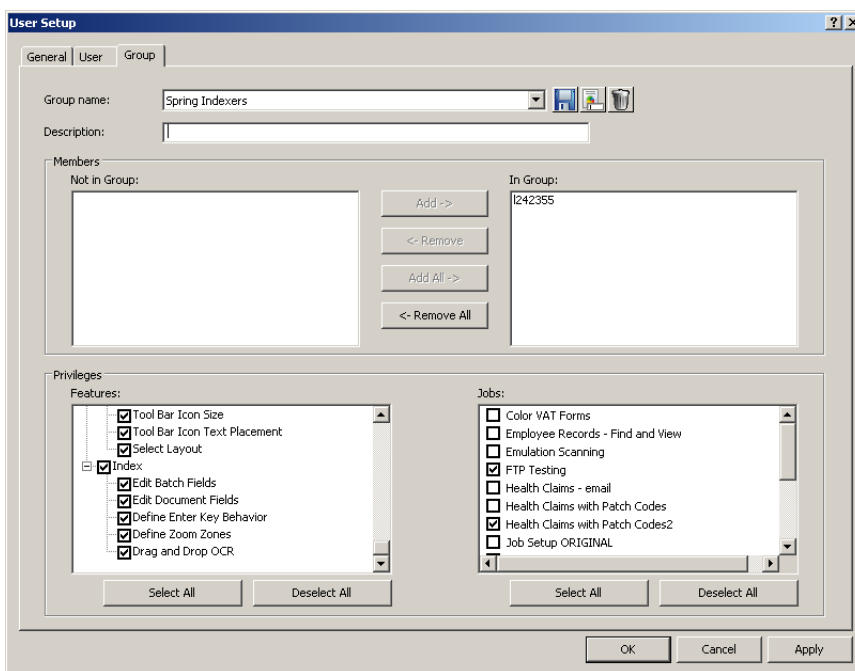
NOTE: The user can change this password by selecting **File > Change Password**.

Group tab

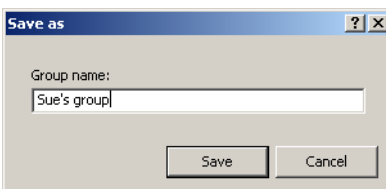
Use the Group tab to add and delete user groups as well as add and remove job privileges.

Setting up a user group

1. Select **File > User Setup** and open the **Group** tab. The Group tab of the User Setup dialog box will be displayed.



2. Click the **Add** icon. The Save as dialog box will be displayed.



3. Enter a new group name and click **OK**. The new group name will be displayed in the *Group name* drop down list. You can also add notes about the group in the *Description* field.

NOTE: When creating a new group, you must create the group first and then go to the User tab to add members to the group.

4. Use the **Add**, **Remove**, **Add All**, **Remove All** buttons in the *Members* boxes to move users in or out of the selected group. The *Members* boxes contain all users who are eligible to be added to the group. When creating a new group, the *Not in group* and *In group* fields will be blank.

5. Under **Privileges: Features**, select the Capture Pro Software functions, toolbars, and menus that you want available for members of this group. You can use **Select All** or **Deselect All** to make global changes. The default settings allow the group total access to all the software features and job setups.
6. Under **Privileges: Jobs**, select the job setups that you want available for members of this group. You can use **Select All** or **Deselect All** to make global changes.
7. Click **OK**.

Deleting a group

1. Select **File > User Setup** and open the **Group** tab. The Group tab of the User Setup dialog box will be displayed.
2. Select the group that you want to delete from the *Group name* drop-down list.
3. Click the **Delete** icon. A confirmation box will be displayed. Click **Yes** to delete the group.

NOTE: When you delete a group, the users in that group are removed from the group and returned to the *Members: Not in Group* list.

Renaming a group

1. Select **File > User Setup** and open the **Group** tab. The Group tab of the User Setup dialog box will be displayed.
2. Select the group that you want to rename from the *Group name* drop-down list.
3. Click the **Rename** icon. The Rename dialog box will be displayed.
4. Enter the new group name and click **OK**.

8 Auto Import

Overview

Auto Import allows you to import images into Capture Pro Software without the use of a local scanner or manual intervention. This is done by observing special directories called “watch folders”. Files to be imported will be copied into subfolders within a watch folder which are called **Auto Import** or **AI batch** folders. Auto import extracts images from these files and streams them into the Capture Pro Software workstation just as if they had originated from a local scanner.

To auto import files create an AI batch folder in a watch folder. The processing instructions for this AI batch folder have been defined in the Auto Import Setup process and associated with the watch folder that the AI batch folder is contained within. A countdown timer will then be started on the new AI batch. The user will copy files (which may be contained in nested subfolders) into the AI batch folder. Every time a new file appears anywhere in the AI batch folder or its subfolders, the countdown timer will be reset to its initial value and the countdown will begin again. If the timer expires, the AI batch folder will be locked and added to the end of an auto import capture queue for processing. See “Auto Import operation” for more information.

For MFP (Multiple Function Printers) type devices that are not able to create AI batch folders, image files may be copied directly to the watch folder.

Special batch separation rules can be specified for auto import so new batches can optionally be created for each new AI batch. Aside from that, processing will occur as in any other scan job according the job and page setup rules. Every AI batch will be completely processed before moving to the next.

These image file formats are supported: tiff, jpg, pdf, bmp, ioca, modca, gif, cmp and png.

Auto Import Setup

1. Select **Auto Import Setup** from the Capture menu. The Auto Import Setup dialog box will be displayed.

NOTE: The settings you make on this dialog box apply to any AI batches created within the specified auto import location (watch folder).

Auto Import Setup

☐ Start Auto Import when application is launched (Auto Import must be the selected source)

Auto import name
Upload

Settings

Auto import location:
C:\AutoImport\Hot Folder Browse...

Auto import timeout: 60 seconds

Job setup for auto import:
Ready to Scan Setup...

Page setup for auto import:
Delete Blanks Setup...

Separation Options...

Archive

☒ Backup the files to:
C:\AutoImport\Backup Files Browse...

Error Handling

Maximum import error: 1

Cache the error files and data to:
C:\AutoImport\Error Cache Browse...

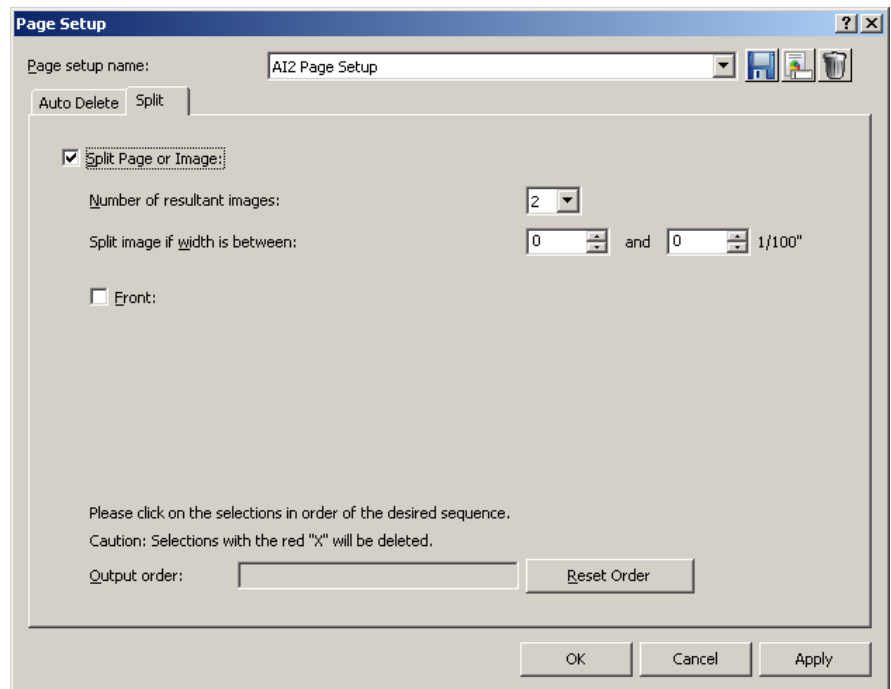
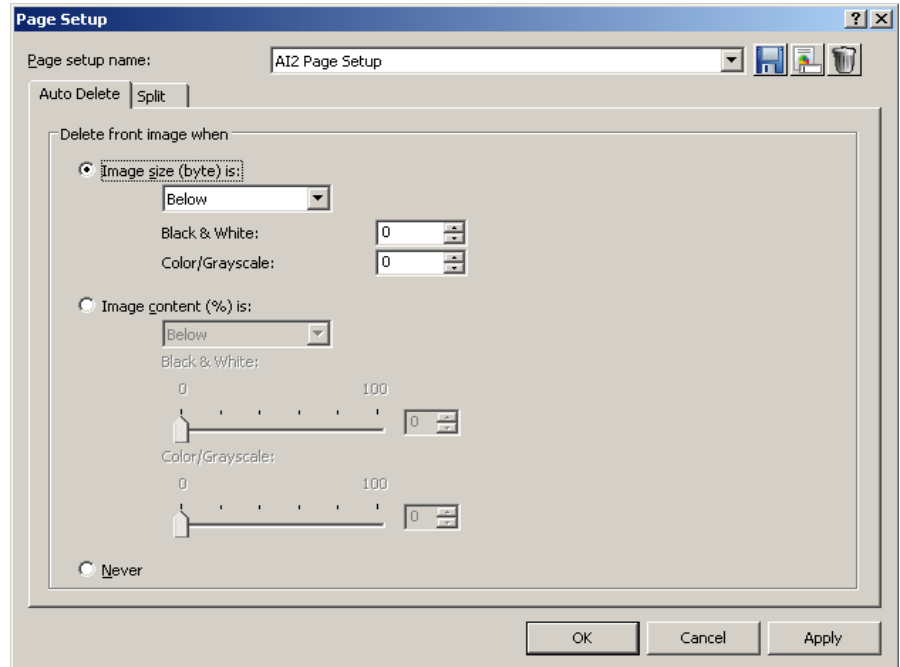
OK Cancel Apply

2. Select **Start Auto Import when application is launched** to automatically begin watching your auto import watch folder when Capture Pro is launched.
3. Enter a name for this auto import setup. The name is a user-friendly reference and does not refer to a folder name or any other specific reference.
4. Select a location for the auto import watch folder associated with this auto import configuration. Auto import will monitor this folder for the creation of new AI batch folders and will process the AI batch after the timeout interval has expired (see "Auto Import operation" for more information).

There are several conditions that apply to the watch folder.

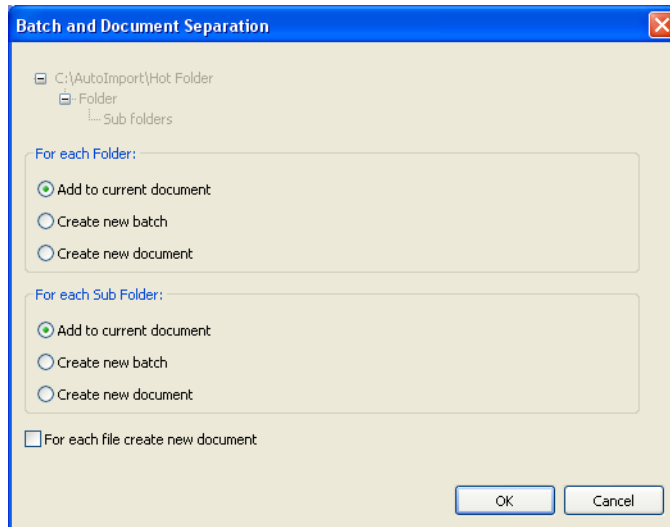
- The watch folder must have Read / Write access to any user running Capture Pro Software.
 - The watch folder needs to be writeable from any intended image source. If it will be accessed from a network, you need to confirm that network sharing is setup to allow Write access from any users, network scanners or other devices which copy files into the watch folder.
 - Capture Pro Software will not attempt to configure any file share or set user access privileges on the watch folder. Configuration and file sharing is your responsibility.
 - The watch folder must be a local or mapped drive.
5. Select an auto import timeout interval. This interval should be based on the maximum delay expected from any source which sends files to the watch folder. This can vary a great deal depending on the operation. For example:
- **Network Scanner**—a user has set up a Scan Station 500 to send images directly to a watch folder over a network. The operation consists of scanning a stack of paper, removing it from the scanner, picking up the next stack, and resuming the scan operation. There is a 60-second delay required to make this transition. The watch folder has been configured with a 120-second delay in order to allow the user to pick up the next stack without timing out and closing the AI batch.
 - **Copy images from network folder**—a user has a set of files that were captured using another scanner (or another input source). Transferring them to the Capture Pro Software workstation for auto import requires a “copy” operation. The local network delivers images at one-second intervals. The timeout interval is set at 10 seconds.
- Refer to the section entitled, “Auto Import operation” for more information.
6. Select or create a job setup to be associated with this watch folder.

7. Select or create a page setup to be associated with this watch folder. Page setup options are restricted to those shown below.



8. Select **Separation Options** to select batch and document separation options for the auto import folder and any subfolders it may contain. You may also choose to create a new document for each file. This option is useful if each file contains a multi-page document.

The Separation Options are limited when files are copied directly to the watch folder because a folder and subfolder will not exist. The only option that may be used is **For each file create new document**. When this option is unchecked, all the files copied to the watch folder will be placed in a single document. When this option is checked, a new document will be created for each file.

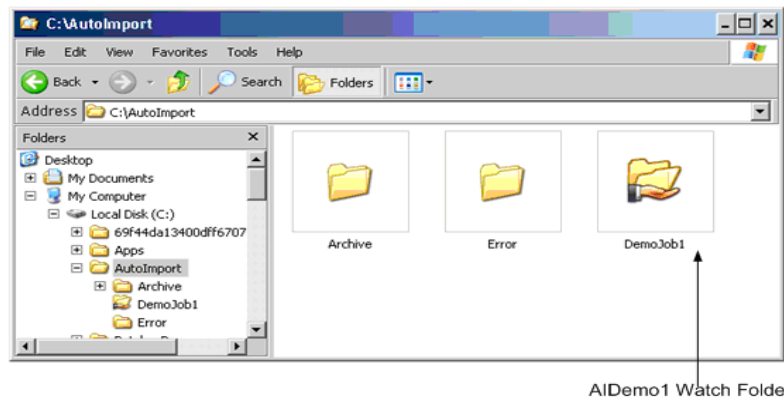


9. Select **Backup the files to** and specify a backup location if you want to archive the contents of the AI batch when auto import is complete.
- Archive will copy the entire content of an AI batch to the specified archive location including any unprocessed files (such as spreadsheets or word processing documents) in their original form along with the original image files.
- A single archive location can be used for multiple watch folders.
 - You do not have to create a unique archive folder for every auto import setup.
 - The archive location must be a local or mapped drive.
10. Specify the number of errors that are allowed before auto import processing is interrupted. Errors occur when an image file cannot be properly read. These errors do not apply to indexing errors or anything else other than the ability to open and read the contents of a supported image file. If the value in **Maximum import errors** drop-down box is exceeded, processing will stop and a dialog box will be displayed allowing the user to retry the bad image, skip the bad image, or abort the auto import. See "Error handling" for more information regarding error handling and recovery.
11. Specify a location for unreadable files to be copied to in the *Cache the error files and data to* field. During auto import processing, if a supported file cannot be opened, a "place holder" image will be substituted and the erroneous image will be copied into the error cache.
- NOTE: The error cache location must be a local or mapped drive.
12. Click **OK** when finished.

Auto Import operation

NOTE: Special icons have been added to some of the folders in the following examples for clarity. These icons will not appear on the actual folders in a real auto import setup.

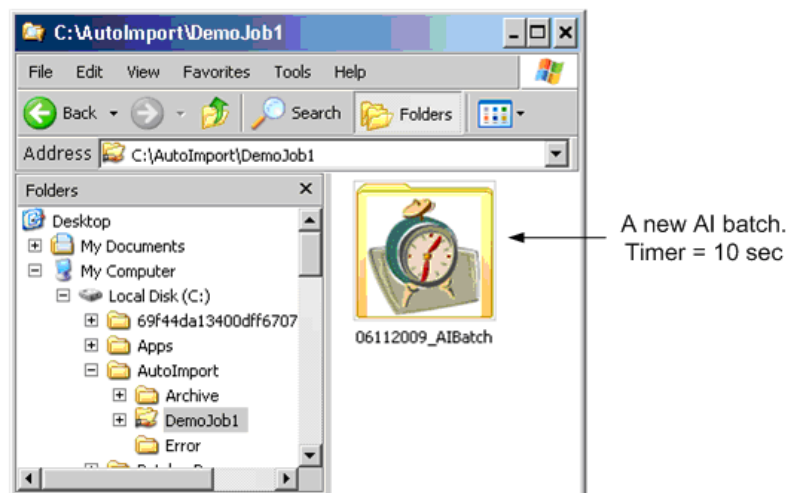
Following the AIDemo1 auto import setup previously described the directories will look like this:



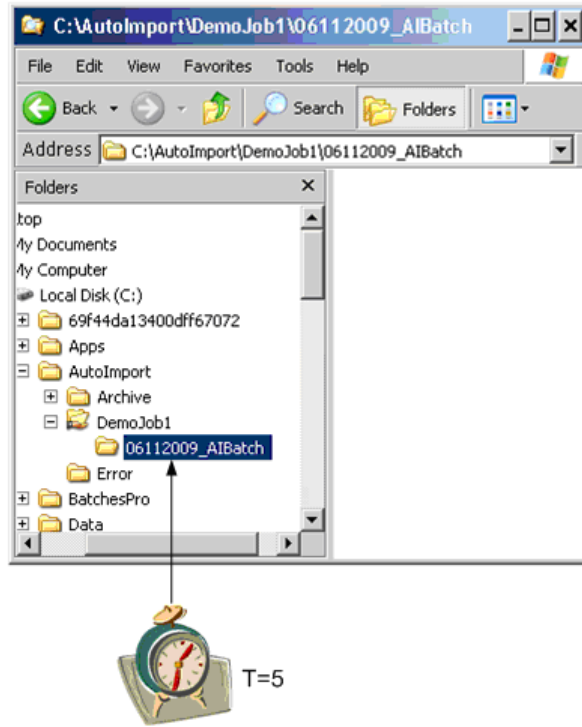
To enable Auto Import, select **File > Workstation Setup**, then select **Auto Import** as your source. This disables all scanners and scanner-specific setups. If you have not selected **Start Auto Import when application is launched**, then you will need to select **Start** as if you were starting a scanner. Auto import will begin watching all previously defined watch folders for incoming files, actively monitors all watch folders and processes any new AI batch jobs in first-in, first-out order until **Stop** is selected. To resume normal scanning operations, select **File > Workstation Setup** and select your scanner.

NOTE: If an auto import setup becomes obsolete, it should be deleted before related folders are manually removed to avoid error messages.

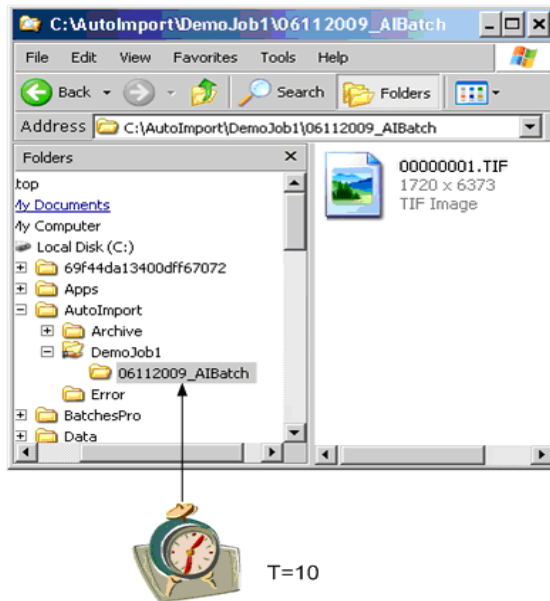
To create a new AI batch, a new AI batch folder will be created in the watch folder.



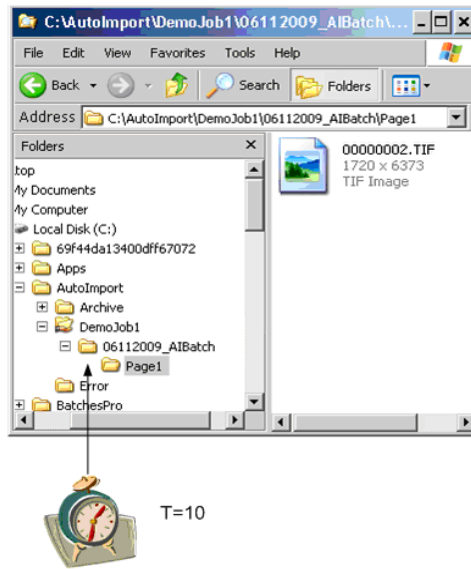
The timer will begin to count down. After 5 seconds, no new files have been added to the AI batch folder (06112009_AIBatch) and the counter is now at 5.



Whenever a file appears in the AI batch folder, or any subfolder of the AI batch folder, the timer is reset.

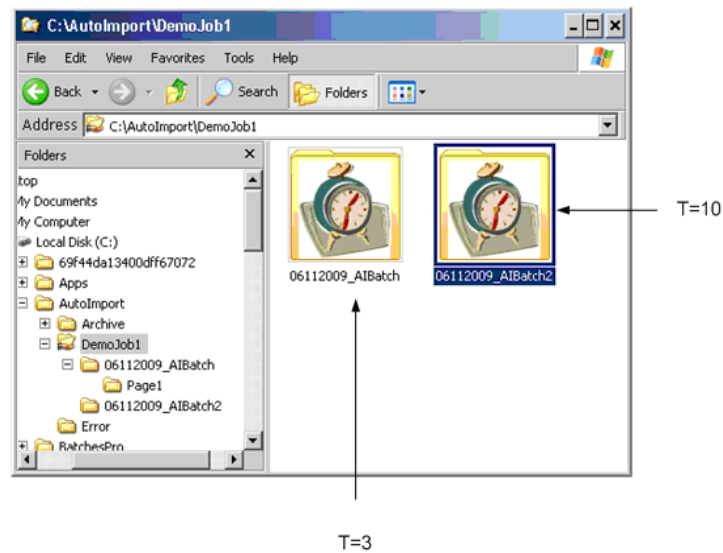


Subfolders within the AI batch folders can be nested. The timer on the parent AI batch folder will be reset. Additions to nested subfolders within 06112009_AIBatch will reset this timer. Nested subfolders do not have their own timers. There is only one timer for the 06112009_AIBatch.

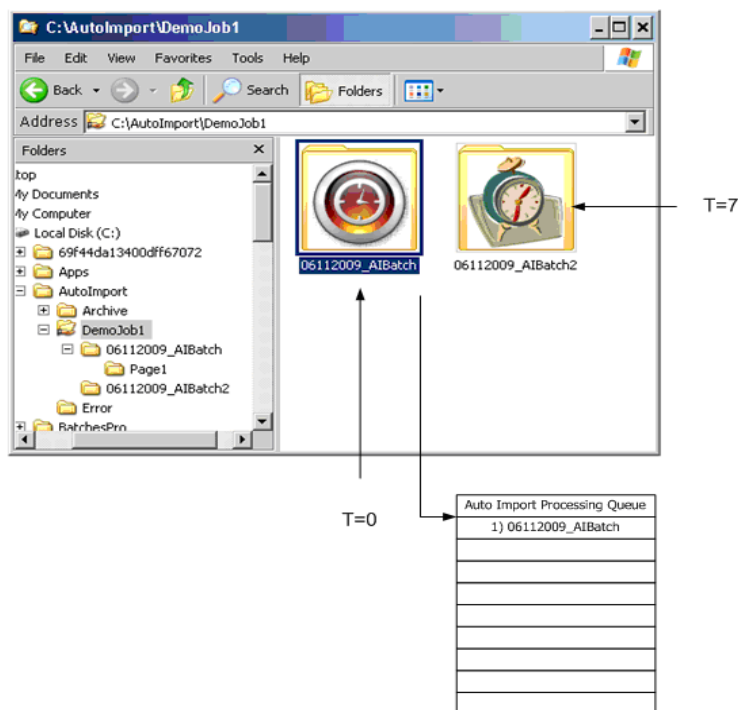


NOTE: Paths that exceed 256 characters may not be supported by the Windows operating system. It is recommended that subfolders and file names be kept within this limit.

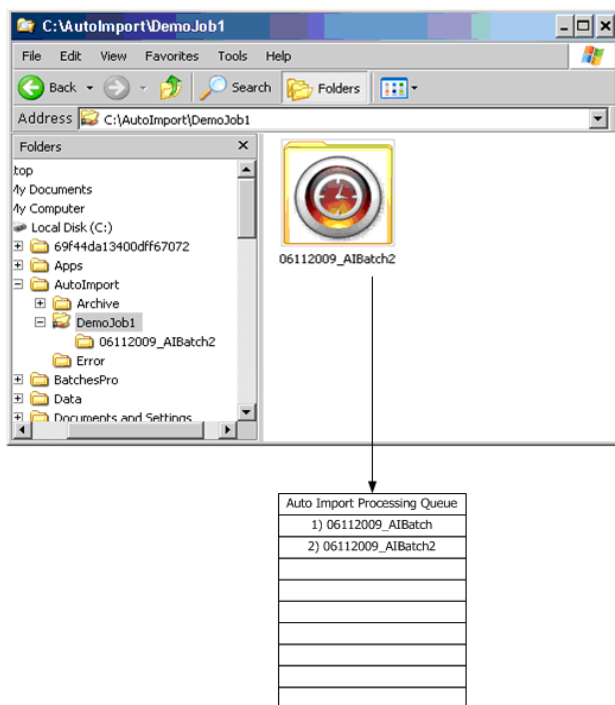
A new AI batch folder can appear in the watch folder at any time. It will get its own timer and operate independently of other AI batches.



When a timer expires, the AI batch folder is locked, and inserted into the auto import processing queue.



Other jobs will be inserted into the processing queue as their timers expire.



The Auto Import processing queue will be processed in first-in, first-out order. In this example, the entire contents of 06112009_AIBatch will be processed followed by 06112009_AIBatch2. Since these two AI batches have the same job setup (they came from the same watch folder), a batch separator will be inserted between the two AI batches according to the AIDemo1 job setup.

Files within an AI batch will be processed by recursively iterating through files and subfolders and processing their contents in alphanumeric order.

However, since ALL AI batches share the same Auto Import processing queue, if an AI batch from a different watch folder were to be next in the queue, a batch separator would be inserted regardless of auto import setup options.

AI batches in the Auto Import processing queue will be processed in first-in, first-out order. There is no management facility for this queue. All AI batches will be processed in their entirety, in sequence barring errors (see “Error handling”).

When the entire batch has been processed, the original files will optionally be copied into the archive.

Server/Service configuration

Installing Auto Import on a Windows Server operating system provides a more robust environment and minimizes operator involvement. It is recommended that the watch folder also be located on the same server.

1. Install Capture Pro Auto Import on the server using the procedure found in the **Auto Import Setup** section.
2. Launch Capture Pro and configure your Auto Import job(s).

Be sure to check the option: **Start Auto Import when application is launched**.

NOTE: If the watch folder is not located on the server, the Capture Pro Auto Import Service will need to have read and write access to the watch folder. This is typically difficult because services have no defined user.

3. Verify that Auto Import works properly.
4. Shut down Capture Pro Software.
5. Download the Capture Pro Auto Import Service from the Capture Pro Software website at www.kodakalaris.com/go/CaptureProAIService.
6. Install Capture Pro Auto Import Service on the same server on which Capture Pro Auto Import is installed.
7. By default the Capture Pro Auto Import Service will be configured for Automatic startup and will have an initial status of *Stopped*. Manually start the service or restart the server.

Capture Pro Auto Import is now running on the server. Any image files placed in the watch folder will be imported and processed as described by the Job selected in the Auto Import setup.

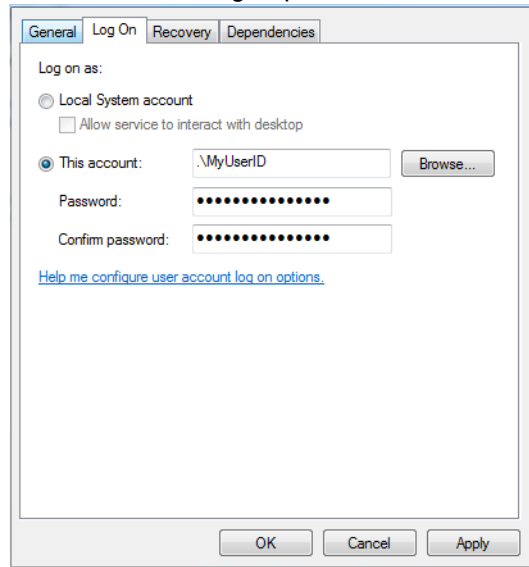
Auto Import will be launched automatically whenever the server is restarted.

To modify or add job setups, stop the Capture Pro Auto Import Service and manually launch Capture Pro Software. When updates are complete, shut down Capture Pro Software and manually start the Capture Pro Auto Import Service or restart the server.

NOTE: If a Job setup is modified in a shared workgroup environment, Auto Import needs to be stopped and restarted for the changes to take effect.

Auto Import Service Properties

If it is necessary to change the Auto Import service Log On from the default Local System account to a User account, make sure to add the user to the Local Administration group.



Error handling

When a batch is being processed, if a supported image file cannot be opened:

- the bad file will be copied into the error cache,
- a generic "error" image will substituted, and
- the error count for the AI batch will be incremented.

If the error threshold defined in the batch setup has been reached, processing of the batch will stop. A dialog box will be displayed with the following options:

- **Ignore:** move ahead to the next image. The batch will resume processing until the next bad image is encountered.
- **Abort:** the remaining files in the batch will be copied into the error cache and auto import will stop. Following an abort, when restarted, auto import proceeds with the next batch in the queue. There is no automated recovery procedure for batches copied into the error cache. The user will have to locate and correct the bad files and manually reinsert the batch into the watch folder.

9 Intelligent Job Select

Overview

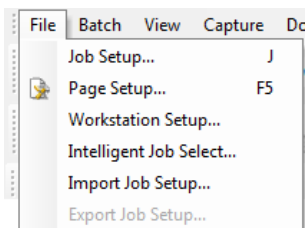
The Intelligent Job Select capability found in the Capture Pro File menu allows you to set up advanced parameters to change Job Setups or Page Setups *automatically* during scanning. When a patch code with predefined conditions is scanned, either page or job setup will change without any operator action needed.

Effective use of Intelligent Job Select requires document preparation to add patch page(s) to the batch.

This feature is available for Kodak Scanners and Alaris Scanners only. If you do not have a Kodak Scanner or Alaris Scanner, this option will be disabled. This chapter provides information and procedures on how to select options on Intelligent Job Select General and Setup tabs.

You will need to:

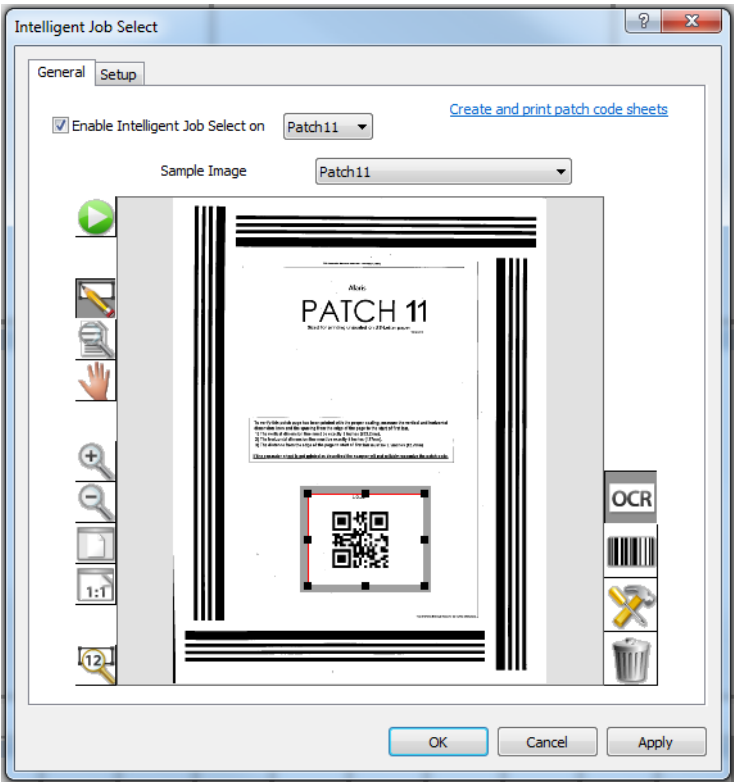
1. Set up one or more patch pages to signal setup changes.
2. Configure Capture Pro for the change meant by each patch page.



To access Intelligent Job Select, select **Intelligent Job Select...** from the Capture Pro File menu.

Intelligent Job Select Setup - General tab

The Intelligent Job Select Setup window allows you to define when and how setup changes will happen, based on patch codes read by the scanner. The General tab of the window has the following options:



Enable Intelligent Job Select on—choose the patch type for your feature patch page. Valid feature patches are Patch 10, Patch 11, Patch 12, Patch 13, Patch 14, or Patch 15.

Sample Image—choose an image already stored as a sample image, to define the rule for this patch. The drop-down list contains all the images that have been scanned for Intelligent Job Select setup. You must have at least one image in this list before you can define a bar code or OCR zone.

Icons

	Start/Scan —opens the Scan Image dialog box, which allows you to enter an Image name and scan an image containing bar codes, OCR text segments or mark areas. NOTE: Capture Pro Software will use whatever Page Setup is currently selected, to scan the sample image.
	Draw region —allows you to draw a rectangle around a bar code or OCR text segment on the scanned image and then displays the Bar Code Zone Setup or OCR Zone Setup dialog box.
	Magnify —enlarges a portion of the image. You can enlarge any area on the image where you place the Magnify tool and click and hold.
	Pan —allows you to move the image around when the image is larger than the Feature Patch Setup image window.
	Zoom in —zooms in on the image.

	Zoom out —zooms out on the image.
	Fit window —changes the image display so the image fits the Intelligent Job Select Setup image window.
	Actual size —displays the image at the actual size. One scanned pixel equals one pixel on the Intelligent Job Select Setup image window.
	Test selected bar code, OCR or Mark Detection zone —opens the Bar Code, OCR and Mark Detection Values dialog box, which allows you to view test results on a selected zone.
	Create OCR zone —enables you to create an OCR zone from the displayed image in the Intelligent Job Select Setup window.
	Create barcode —enables you to create a bar code zone from the displayed image in the Bar Code, OCR & Mark Detection window.
	Zone properties —opens either the Bar Code Zone Setup, OCR Zone Setup or the Mark Detection Zone Setup dialog box which allows you to view the properties of the selected bar code, OCR or mark detection zone.
	Delete selected zone —allows you to delete a bar code, OCR or mark detection zone. A confirmation box will be displayed to verify your choice.

OK—saves your settings and closes the dialog box

CANCEL—discards changes that were not applied and closes the dialog box

APPLY—saves your settings and leave the dialog box open

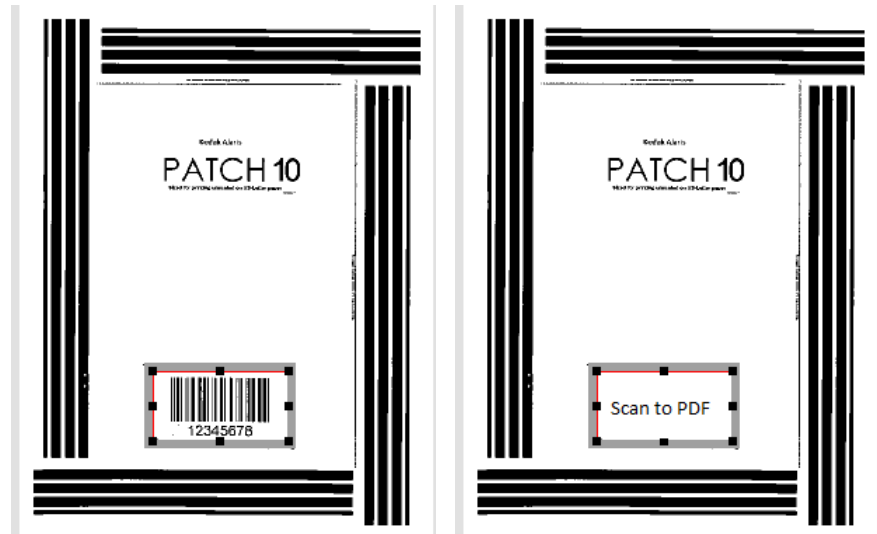
Create a feature patch page

Create a patch page that will be used to initiate a setup change. Use either Patch 10, Patch 11, Patch 12, Patch 13, Patch 14, or Patch 15. The patch page must be customized with either a barcode or text.

NOTE: Only one zone is allowed for Intelligent Job Select Setup. To have multiple ways to change setups, create one patch page for each.

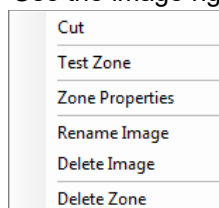
For example the Patch 10 page below on the left could be used to implement a setup change such as, "If bar code value is 12345678, then change Page Setup to Color 150 DPI."

The Patch 10 page below on the right could be used to implement a setup change such as, "If OCR zone = 'Scan to PDF' then change job to Scan to PDF."



Create feature patch setup

1. Once you have prepared your patch sheet(s) you will configure the Intelligent Job Select Setup. On the General tab, check **Enable Intelligent Job Select on**. Select the feature patch type that you have customized for this function, from the drop-down list.
2. Choose an image of your patch page from the **Sample Image** drop-down list, or scan in the patch page you created in "Create a feature patch page".
3. Create a bar code zone for the bar code or an OCR zone for the text that you added to the patch page.
4. Test the zone to be sure your bar code or text will be recognized.
5. Use the image right-click menu as needed to adjust your image or zone.



6. Next, set up one or more rules to define the setup change that will happen, when the scanner recognizes this patch page.

Intelligent Job Select - Setup tab

After enabling Intelligent Job Select and setting up a sample image page with a bar code or OCR zone, you will need to create a rule to follow when the feature patch is detected. The rules are defined on the Setup tab of the Intelligent Job Select window. The Setup tab has the following options:

Zone Result	Type	Change to Setup
Scan to PDF	Job Setup	Scan to PDF

If detect

change Job Setup to Scan to PDF

Add Delete

When changing jobs

☒ Always change to page setup in job (slower)

☐ Use one page setup for all jobs (faster):

OK Cancel Apply

If detect—enter the bar code value or OCR text value from the patch page that you set up on the General tab.

Change—choose Job Setup or Page Setup from the drop-down list.

To—choose a Job Setup or Page Setup name from the drop-down list. When the patch page is detected, setup will change to the setup you enter in this field.

Add—once you have defined a rule, the Add button will add it to the displayed list.

Delete—choose a rule from the displayed list and choose Delete to remove the selected rule.

When changing jobs—this option is not available for scanners that perform feature patch code reading in the scanners (e.g. *Kodak i5x50*). On these scanners, scanning will be performed at the scanner rated speed.

- **Always change to page setup in job (slower)**: choose if you want to use the Page Setup that was defined in the job or the last used Page Setup if one is not defined.
- **Use one page setup for all jobs (faster)**: choose if you want to scan at the scanner rate of speed. You must define a Page Setup from the drop-down list that will be used for all jobs.

OK—saves your settings and closes the dialog box.

CANCEL—discards changes that were not applied to the list, and closes the dialog box.

APPLY—saves your settings and leaves the dialog box open.

Define a rule

Your rule will have a format such as: **If detect** <value> **change** <job setup or page setup> **to** <desired setup name>.

1. Set up a rule for a patch page using the **If detect**, **change**, and **to** fields.
2. Once the rule is defined, select the **Add** button to add the rule to the list.
3. Use **Apply** or **OK** to save your changes.
4. Create additional rules if needed. If you have multiple kinds of customized patch sheets, you need a rule for each one.

NOTE: To change a rule, delete it and add a new one.

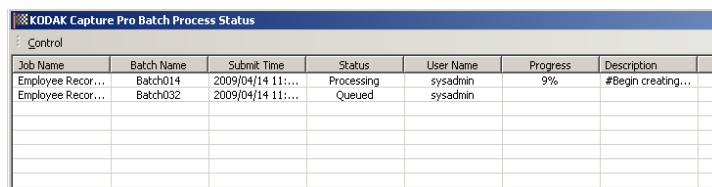
10 Troubleshooting

Clearing errors

The Capture Pro Batch Process Status window provides information on batches that you are preparing for output from Capture Pro Software.

To view the Batch Status window:

- Select **Batch > View Batch Output Status**.



Job Name	Batch Name	Submit Time	Status	User Name	Progress	Description
Employee Recor...	Batch014	2009/04/14 11:11:...	Processing	sysadmin	9%	#Begin creating...
Employee Recor...	Batch032	2009/04/14 11:11:...	Queued	sysadmin		

To clear errors:

- Click on the *Job Name* to **Clear All Errors** or **Clear Selected Errors**.

Command line login

Capture Pro Software will support a login from the command in the form:

`Capture.exe/username<username>/password<password>`

For example, a user with the username “tester” and password “123465” could launch Capture Pro Software with the command:

`Capture.exe/username tester/password 123465`

If the user is using the current Windows user name to log into Capture Pro Software, then they may launch Capture Pro Software with the command:

`Capture.exe/username`

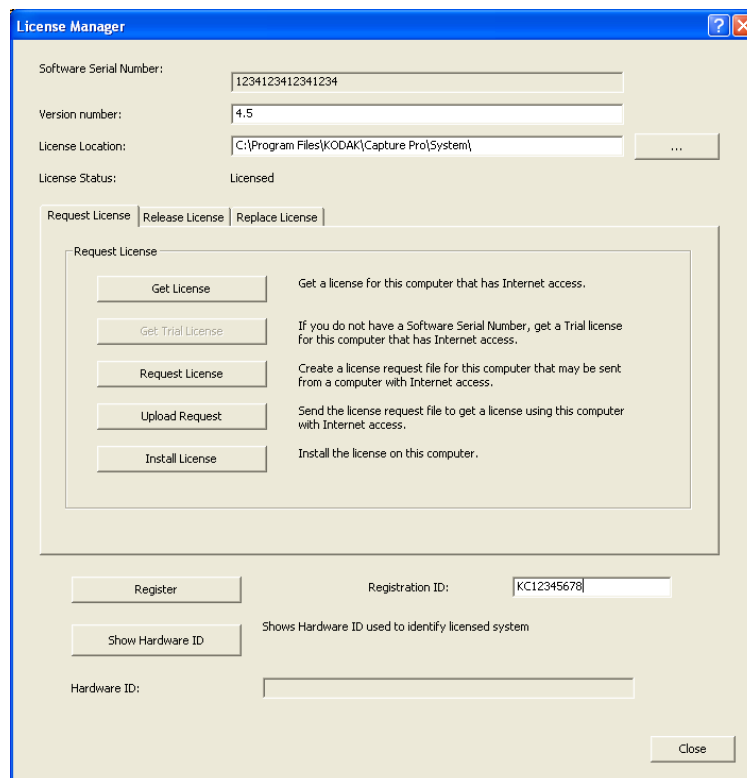
Technical Support

Support for Capture Pro Software can be found on the *Kodak Alaris* website: www.kodakalaris.com/go/CaptureProSupport. The support pages provide product specific information such as access to product upgrade downloads, drivers, accessories and access to the FAQs (Frequently Asked Questions) and details of the support options available for Capture Pro Software available in your country/region.

Appendix A License Manager

The License Manager is a utility that may be installed and run independently of Capture Pro Software. The License Manager is installed with Capture Pro Software and can be accessed and run by selecting **License Manager** from the Help menu or by selecting the shortcut found at **Kodak > Kodak Capture Pro Software**. If Capture Pro Software is not installed on the computer, License Manager may be downloaded from www.alarisworld.com/go/CaptureProDownload. The utility provides a set of functions that may be used to acquire and manage a license for your Capture Pro Software.

The License Manager is the easiest way to get a license for a workstation running Capture Pro Software that does not have internet access.



Software Serial Number—displays the software serial number which is used to identify your license.

Version Number—specifies the Capture Pro Software version that you want to use. Versions previous to Version 4.0.0 may not be selected.

License Location—specifies the location where your license is installed. For a typical installation, the location will be C:\Program Files\Kodak\Capture Pro\System.

License Status—statuses are: *Licensed*, *Temporary License* or *Not Licensed*. Temporary licenses expire on a predetermined date.

License Request, **Release License** and **Replace License** tabs—see the sections that follow for detailed information and procedures.

Register—allows you to register Capture Pro Software and obtain a **Registration ID**. The **Registration ID** may be used for future installations of this license or other Capture Pro Software licenses you may own.

Show Hardware ID—displays the hardware ID that is used to identify the licensed workstation.

Close—closes the License Manager window.

Requesting a license

The License Request functions are used to request a license from the *Kodak Alaris* license server.

The screenshot shows the 'License Manager' window. It has a title bar with a question mark and a close button. The main area contains several input fields and buttons. At the top, there are fields for 'Software Serial Number' (containing '1234123412341234'), 'Version number' (containing '4.5'), 'License Location' (containing 'C:\Program Files\KODAK\Capture Pro\System\'), and 'License Status' (containing 'Licensed'). Below these are three tabs: 'Request License', 'Release License', and 'Replace License'. The 'Request License' tab is active, showing a list of buttons and their descriptions: 'Get License' (Get a license for this computer that has Internet access.), 'Get Trial License' (If you do not have a Software Serial Number, get a Trial license for this computer that has Internet access.), 'Request License' (Create a license request file for this computer that may be sent from a computer with Internet access.), 'Upload Request' (Send the license request file to get a license using this computer with Internet access.), and 'Install License' (Install the license on this computer.). Below the tabs are buttons for 'Register' and 'Show Hardware ID'. The 'Register' button is next to a 'Registration ID' field containing 'KC12345678'. The 'Show Hardware ID' button is next to a 'Hardware ID' field. A 'Close' button is at the bottom right.

Get License—use this option if the workstation to be licensed has internet access.

Get Trial License—allows you to request a trial license if you do not have a software serial number.

Request License—if the workstation to be licensed does not have internet access, select **Request License** to create a license request file that may be used to request a license using a computer with internet access. You will be prompted to enter a location for the license request file.

Upload Request—this function is used on a computer with internet access to send the license request file to the *Kodak Alaris* license server. You will be prompted to enter the location of the license request file. If license request is successful, your license file will be returned to this location.

Install License—this function is used on the workstation without internet access to install the license retrieved from a computer with internet access. You will be prompted for the location of the license file.

Following are some examples of when you would use Request License:

Example 1

Scenario: Capture Pro Software is installed on my workstation. I have purchased an optional feature and need to update my license to enable the optional feature. My workstation has internet access.

Solution:

1. Select **Help > License Manager** from the menu bar.
2. From the License Manager window, select the Request License tab and then select **Get License**.

Your new license will be retrieved and installed.

Example 2

Scenario: I am installing Capture Pro Software on a workstation without internet access. During installation the installer has created a license request file. What do I do now?

Solution:

1. On a different computer with internet access, download the License Manager tool from the Capture Pro Software download site (www.alarisworld.com/go/CaptureProDownload).
2. Install and launch License Manager.
3. From the Request License tab select **Upload Request**.
4. Browse to the license request file that was created on the workstation without internet access and upload the file.

Your license will be returned and stored at the same location where you browsed to select the license request file.

5. Move the returned license file to the workstation where you are installing Capture Pro Software and continue installation.

Example 3

Scenario: Capture Pro Software is installed on my workstation. I have purchased an optional feature and need to update my license to enable the optional feature. My workstation does not have internet access.

Solution:

1. Select **Help > License Manager** from the menu bar.
2. From the License Manager window, select the License Request tab and then select **Request License**.
3. Enter the path to where you want the license request file to be saved. Select **Request**. A license request file will be created.
4. Move the license request file to a computer with internet access.
5. On the computer with internet access, download the License Manager tool from the Capture Pro Software download site (www.alarisworld.com/go/CaptureProDownload).
6. Install and launch License Manager.

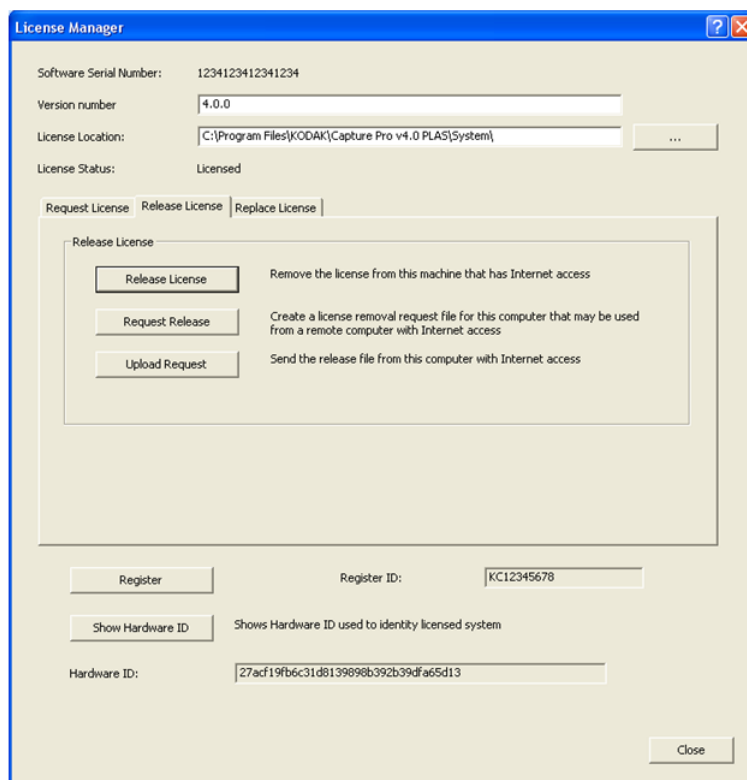
7. From the License Request tab select **Upload Request**.
8. Browse to the license request file you moved to this computer and select **Upload**.

Your license will be returned and stored at the same location where you browsed to select the license request file.

9. Move the returned license file to the workstation where Capture Pro Software is running and select **Install License** from the License Request tab. You will be prompted to enter the path to the license file you moved to the workstation.

Release license

The Release License functions are used to *release* the license from the currently assigned workstation. You must release a license before uninstalling Capture Pro Software or moving the license to a different workstation.



Release License—if the licensed workstation has internet access, this option will remove the license from the workstation and make the license available for a new workstation.

Request Release—if the licensed workstation does not have internet access, use this option to create a release request file. This file may be moved to a computer with internet access and sent to the *Kodak Alaris* license server using **Upload Request**. You will be prompted to enter a location for the release request file.

Upload Request—this option is used to release your license by sending the release request file to the *Kodak Alaris* license server from a computer with internet access. You will be prompted to enter the location of the release request file.

Following are some examples of when you would use Release License:

Example 1

Scenario: Capture Pro Software is installed on my workstation. I would like to move Capture Pro Software to a new, faster workstation. My workstation has internet access.

Solution:

1. Select **Help>License Manager** from the menu bar.
2. From the License Manager window, select the Release License tab and then select **Release License**.
3. Exit Capture Pro Software. Your license will be removed from this workstation and is now available to be installed on the new workstation.

Example 2

Scenario: Capture Pro Software is installed on my workstation and I need to reconfigure the workstation (add/remove memory, update the BIOS, change the Machine Name, replace the mother board, etc.). My workstation has internet access.

Solution:

1. Select **Help > License Manager** from the menu bar.
2. From the License Manager window, select the Release License tab and then select **Release License**.
3. Exit Capture Pro Software.
4. Reconfigure the workstation as needed.
5. Launch the License Manager tool typically found in the Capture Pro application folder <drive>: \Program Files\Kodak\Capture Pro\KCSPLM.exe.
6. From the License Manager window, select the License Request tab and select **Get License**. Your new license will be retrieved and installed.

Example 3

Scenario: Capture Pro Software is installed on my workstation and I need to reconfigure the workstation (add/remove memory, update the BIOS, change the Machine Name, replace the mother board, etc.). My workstation does not have internet access.

Solution:

1. Select **Help > License Manager** from the menu bar.
2. From the License Manager window, select the Release License tab and then select **Request Release**. Enter the path to where you want the release request file to be stored. Select **Request**.
3. Exit Capture Pro Software.
4. Move the release request file to a computer with internet access.
5. Download the License Manager tool from the Capture Pro Software download site.

6. Install and launch License Manager.
7. From the Release License tab select **Upload Request**.
8. Browse to the license request file you moved to this computer and select **Upload**.
9. Reconfigure the workstation running Capture Pro Software.
10. When configuration is complete, launch the License Manager tool typically found in the Capture Pro application folder <drive>: \Program Files\Kodak\Capture Pro\KCSPLM.exe.
11. Select the License Request tab and then select **Request License**. Enter the path to where you want the license request file to be saved. Select **Request**. A license request file will be created.
12. Move the license request file to the computer with internet access that has the License Manager installed.
13. From the License Request tab, select **Upload Request**.
14. Browse to the license request file you moved to this computer and select **Upload**.
15. Move the returned license file to the workstation without internet access and select the License Request tab and then select **Install License**. You will be prompted to enter the path to the license file you moved to this workstation.

Example 4

Scenario: I have made changes to my workstation hardware configuration and now when I launch Capture Pro Software I get the message, **Invalid license code**. What do I do?

Solution 1:

1. Change the workstation hardware configuration back to the original settings. If this is not possible, see Solution 2.
2. See **Example 2** if you have internet access or **Example 3** if your workstation does not have internet access.

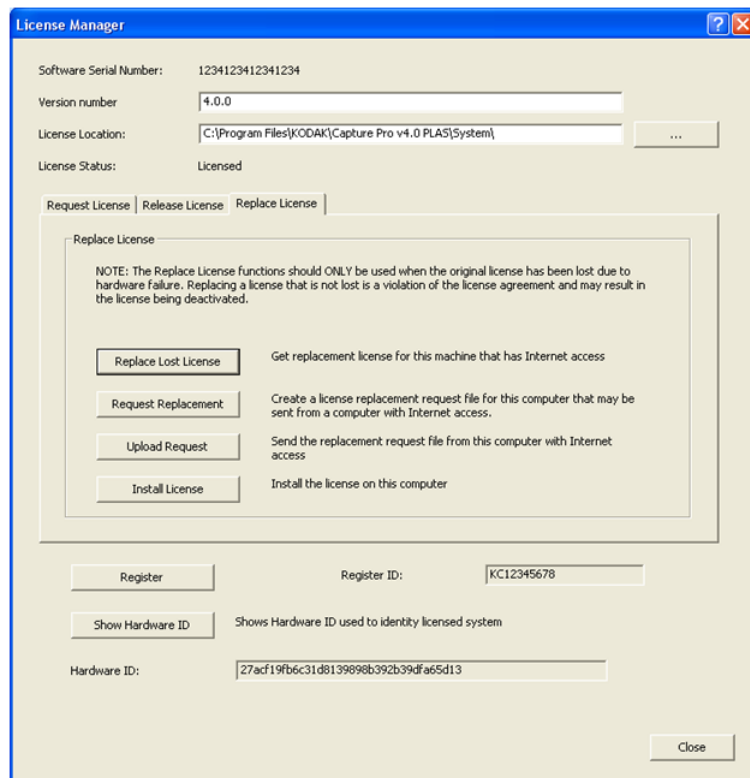
Solution 2:

- If your workstation has internet access:
 1. From the Capture Pro installation folder (typically **Program Files > Kodak > Capture Pro**), run the License Manager, KCSPLM.exe.
 2. From the Replace License tab, select **Replace Lost License**. A new license will be retrieved and installed.
- If your workstation does not have internet access:
 1. From the Capture Pro installation folder (typically **Program Files > Kodak > Capture Pro**), run the License Manager, KCSPLM.exe.
 2. From the Replace License tab, select **Request Replacement**. Enter the path to where you want the replacement request file to be saved. Select **Request**. A license replacement request file will be created.
 3. Exit Capture Pro Software.
 4. Move the replacement request file to a computer with internet access.

5. On the computer with internet access, download the License Manager tool from the Capture Pro Software download site.
6. Install and launch License Manager.
7. From the Replace License tab select **Upload Request**.
8. Browse to the replacement request file you moved to this computer and select **Upload**. Your license will be returned and stored at the same location where you browsed to select the replacement request file.
9. Move the returned license file to the workstation without internet access.
10. On the workstation without internet access, go to the Replace License tab and select **Install License**.
11. Browse to the location of the license file you moved to this workstation and select **Install**.

Replacing a license

The Replace License functions are used to replace an original license that has been lost due to equipment failure or loss. Replacing a license that is not lost is a violation of the license agreement and may result in the forfeit of the license.



Replace Lost License—if the replacement workstation has internet access, this option will retrieve and install a new license for this workstation.

Request Replacement—if the replacement workstation does not have internet access, use this option to create a license replacement request file. This file may be moved to a computer with internet access and sent to the *Kodak Alaris* license server using **Upload Request**.

Upload Request—this option is used on a computer with internet access to send the replacement license request file to the *Kodak Alaris* license server.

Install License—this function is used on the workstation without internet access to install the license retrieved from a computer with internet access.

Following are some examples of when you would use Replace License:

Example 1

Scenario: The hard drive on my Capture Pro Software workstation failed and I cannot recover the contents. My workstation has internet access. What do I do?

Solution:

1. Before installing your Capture Pro Software, download the License Manager tool from the Capture Pro Software download site.
2. Install and launch the License Manager.
3. From the Replace License tab select **Replace Lost License**. A new license is retrieved, but is not needed at this time.
4. Download Capture Pro Software from the Capture Pro Software download site and launch the installer. During installation a copy of your new Capture Pro Software license will be retrieved from the *Kodak Alaris* license server.

Example 2

Scenario: The hard drive on my Capture Pro Software workstation failed and I am not able to recover the contents. My workstation does not have internet access. What do I do?

Solution:

1. Before installing your Capture Pro Software, download the License Manager tool from the Capture Pro Software download site.
2. Install the License Manager on the workstation that does not have internet access and launch the License Manager.
3. From the Replace License tab select **Request Replacement**. Enter the path to where you want the replacement file to be saved. Select **Request**. A license replacement request file will be created.
4. Move the license replacement request file to a computer with internet access.
5. On the computer with internet access, download the License Manager tool from the Capture Pro Software download site.
6. Install and launch the License Manager.
7. From the Replace License tab select **Upload Request**.
8. Browse to the license replacement request file you moved to this computer and select **Upload**. Your license will be returned and stored at the same location where you browsed to select the license replacement request file.
9. Return to the workstation where you want to install Capture Pro Software and run the Capture Pro Software installer. During installation the installer will create a license request file.

NOTE: The license request file is not needed as you have already created a replacement license in Step 8.

10. Move the replacement license file to the workstation where you are installing Capture Pro Software and continue with the installation.

