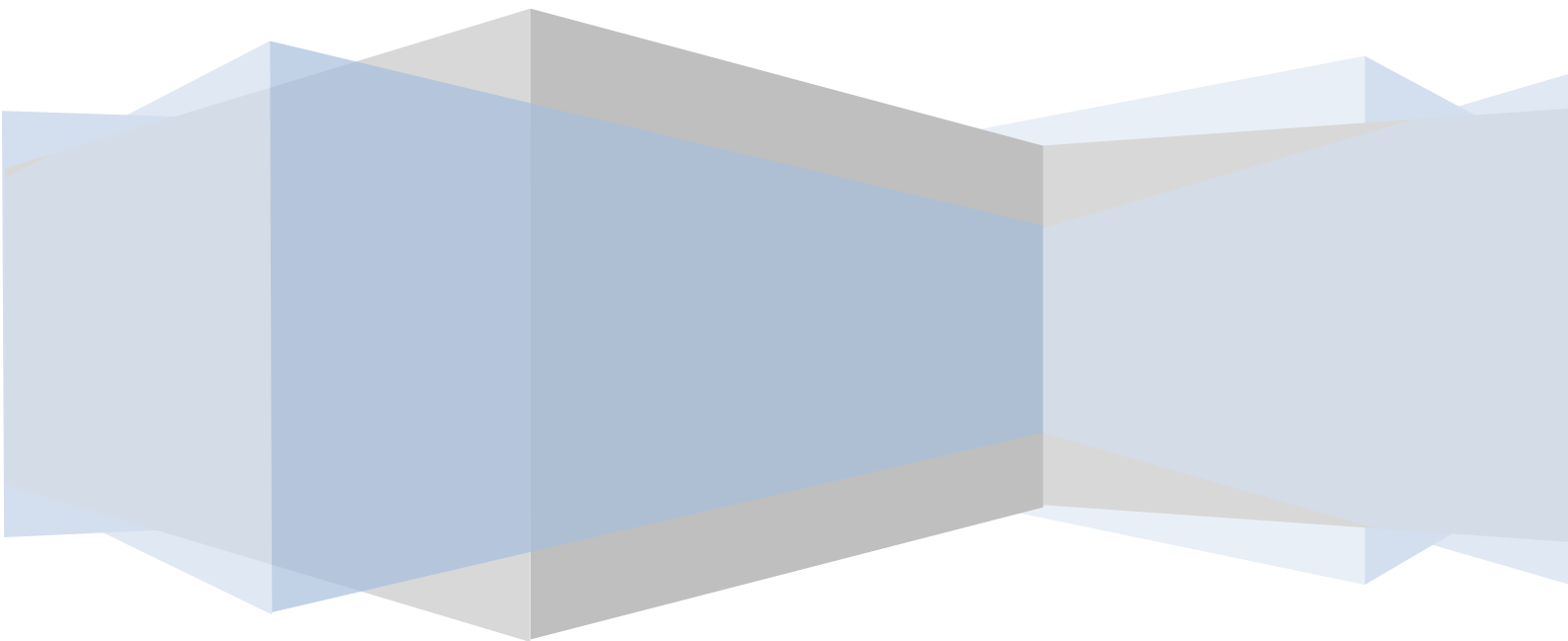




Proven Product, Proven Company

# Scan & Index Solution

Setup Guide



## INTRODUCTION

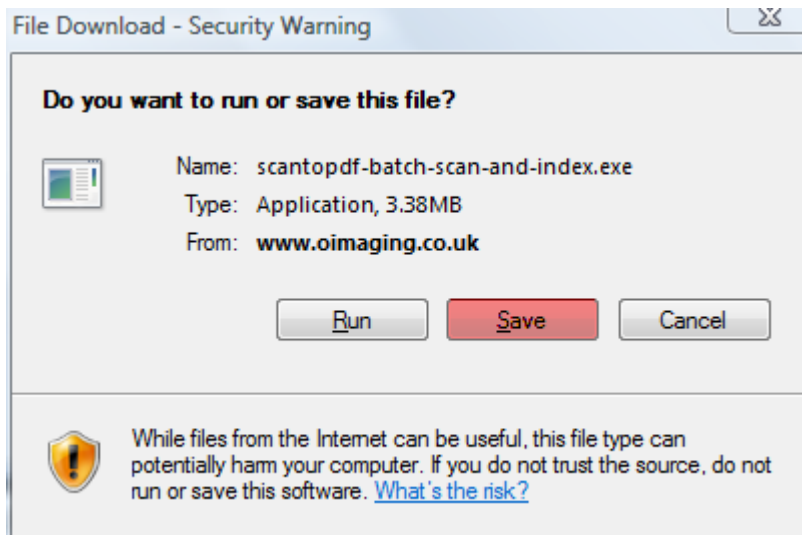
Thank you for evaluating our Scan & Index Solution. This solution is designed to make batch scanning and indexing of documents easy and efficient.

## HOW TO DOWNLOAD AND INSTALL THE EVALUATION SYSTEM

Click this link

<http://www.oimaging.co.uk/downloads/clientfiles/scantopdf-batch-scan-and-index.exe>

The following dialog will Appear (may differ slightly depending on browser)



Click "Save" to download the program to your machine. When download is complete locate the program and run it to install the Scan and Index Evaluation

## HOW TO CONFIGURE THE REQUIRED SETTINGS

All the settings are configured through a single menu

- Start ScanToPDF
- Click Edit
- Click Options



Save

## SAVE SETTINGS

Make sure the “Automatic trigger of save process after scan” option is checked.

*All other settings can be set as required by the user and will not affect the scanning operation*



File namer

## FILENAMER SETTINGS

The settings for the filenamer plug-in will depend on your requirements, but the evaluation is setup to save documents in a folder as follows

C:\PDF Files\{supplierNumber}\{orderDate:ddMMyyyy}\{orderNumber}.pdf

(This can be changed as required)

### Filename Format

The filename format is created from variable data fields entered in the document indexing screen, in the evaluation we have used :

- ❖ supplierNumber – Which is selected from a drop down list (fully configurable using the simple options in document indexing)
- ❖ orderDate – The date of the order
- ❖ orderNumber – The order number
- ❖

### Example

c:\pdf files\SUP12345\12052010\ORD12345.pdf

*All other settings can be set as required by the user and will not affect the scanning operation*



Document Indexing

## DOCUMENT INDEXING SETTINGS

These are accessed by clicking the icon and then selecting the file Default.xml and clicking Edit. This opens up the document indexing configuration screen.

The screenshot shows the 'Metadata Configuration Tool' window. It has a menu bar with 'File' and 'LanguageSettings'. The window is divided into two main sections: 'Window Settings' and 'Field Settings'.

**Window Settings:**

- Window Caption: ScanToPDF Batch Scan & Index
- Interfld: 5
- Window Mode: FullResizing
- Return Moves To Next Field:
- Opacity: 1.0
- Display Mode: ShowforEachDocument

**Field Settings:**

- Select Item To Edit: .....Add New Field.....
- Field Type: TextBox
- Name: \*
- Prompt: \*
- Pattern:
- Error:
- Default:
- Character Casing: Normal
- Mandatory:

Buttons: Add, Remove, Preview, Up, Down

Name	Type	Prompt	Pattern	Error	Default	Defaultlist
supplierNumber	DropDownList	Supplier				SUPP12345-O Imaging Co...
orderDate	Date	Order Date				
orderNumber	TextBox	Order Number				

## WINDOW SETTINGS

Set the Window Caption, all other settings should be left as Default.

## FIELD SETTINGS - ADDING A NEW FIELD

Enter a name for the field (this is referred to in the filename settings)

Enter a Prompt (this is the value displayed on the Indexing Screen)

Enter a pattern (in the form a regular expression) Optional

Enter an Error message (to be displayed if the pattern is not matched)

Enter a default value, for example “Banking”. This is the default value of the field when the document indexing screen is first displayed.

Once all settings are complete, click Add

### FIELD SETTINGS - REMOVING A NEW FIELD

Select the field in the list box view and when selected click Remove.

Name	Type	Prompt	Pattern	Error	Default	Defaultlist
supplierNumber	DropDownList	Supplier				SUPP12345-O Imaging Co...
orderDate	Date	Order Date				
orderNumber	TextBox	Order Number				

### FIELD SETTINGS – CHANGING THE FIELD ORDER

Select the field in the list box view and when selected click the Up or Down button.

### FIELD SETTINGS – CHANGING ITEMS IN DROP DOWN LISTS

When a field type of Drop Down list is used (docType in this Evaluation), the list is populated from the values entered by the user. To edit the list, select the field from the list box at the bottom of the screen – a new set of command buttons will appear which enable the list items to be edited.

Select Item To Edit:  Editing Existing Item supplierNumber

Field Type:   Fill From Fixed List  Fill From Database Connection

Name \*

Select the “Fill From Fixed List” option and click Configure. This opens the list box editor

Add DropDown List

SUPP12345-O Imaging I  
SUPP98765-Any Compa

Type a list Item and click Add. This will add it to the list (highlighted in yellow above). Click Save when done.

To remove an item from the list, select it from the list (highlighted in yellow above) and click the “Remove” button.

When all changes have been made click “Save” to close the list box editor. To cancel the changes, click “Cancel”

## OTHER SETTINGS

*All other settings can be set as required by the user and will not affect the scanning operation.*  
Please contact OiC for further details.