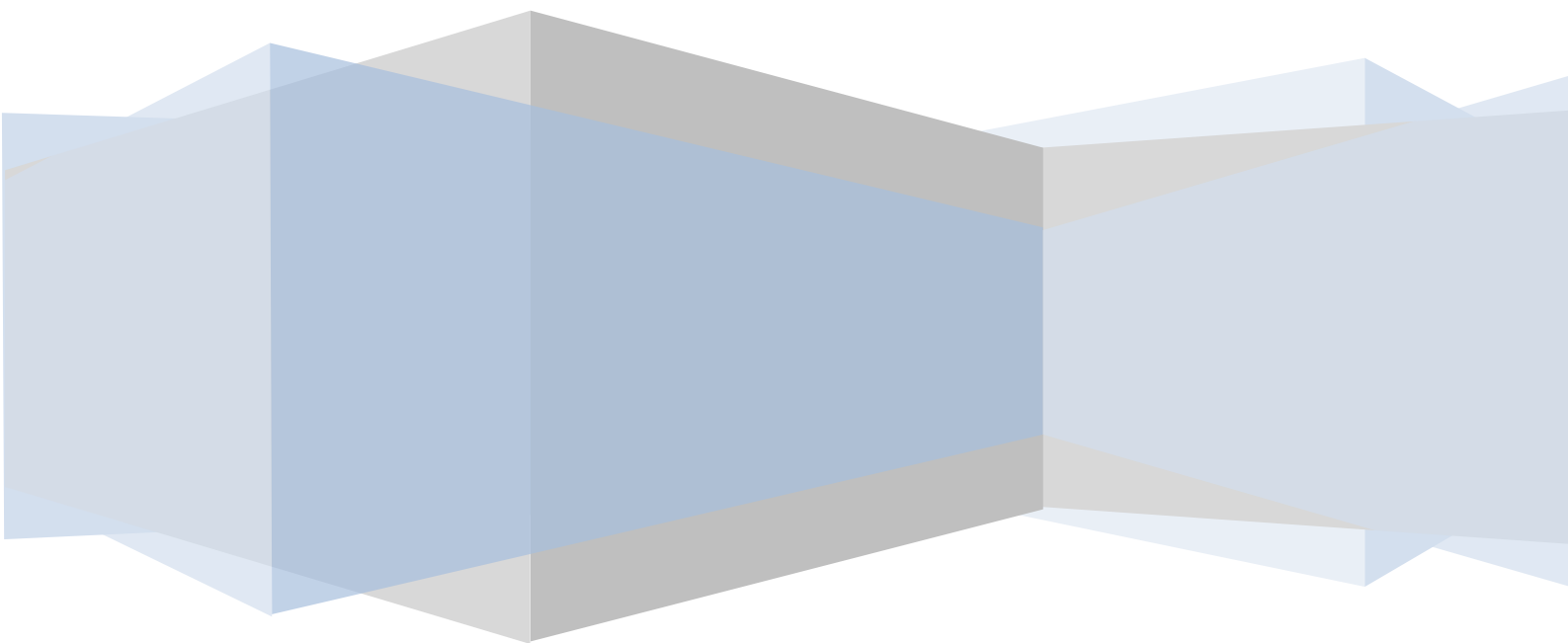




Proven Product, Proven Company

Batch Scanning Solution

Setup Guide

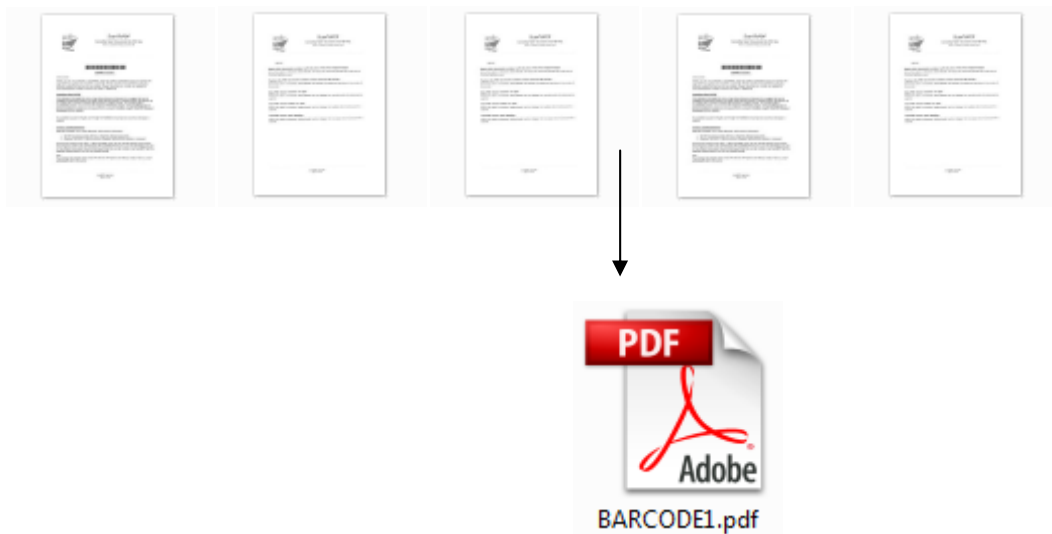


INTRODUCTION

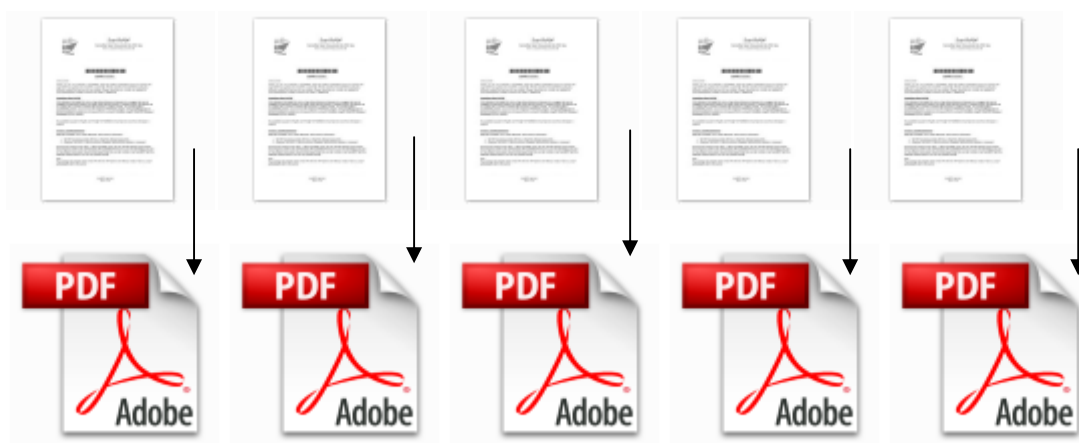
Thank you for evaluating our Batch Scanning Solution. This solution is designed to make the most of your scanners document feeder and make your scanning process as quick and efficient as possible.

There are three ways of separating batches of scanned pages into individual PDF documents using barcodes.

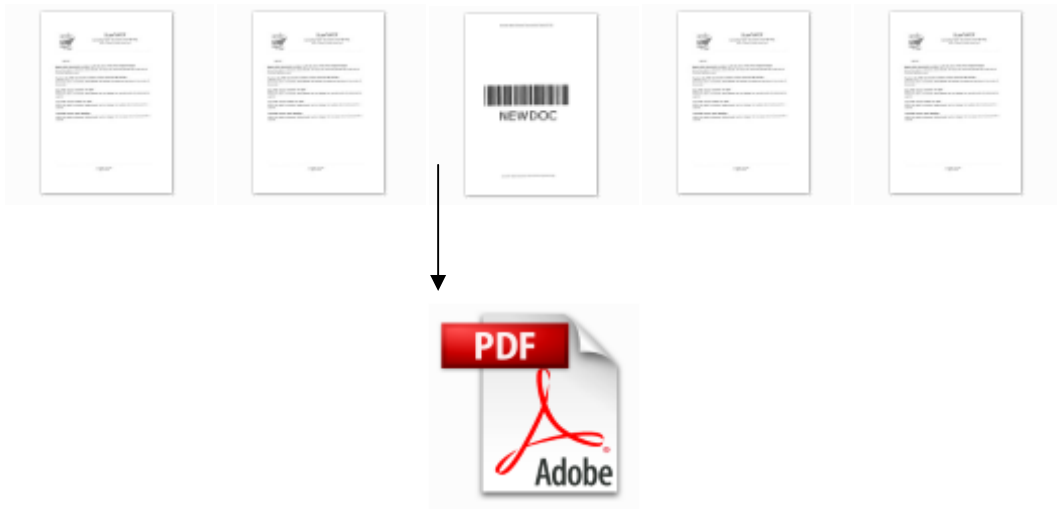
1. **Batch Separation Type 1** - Your documents have barcodes on the 1st page of each batch - every time a new barcode is read a new PDF document is started. The PDF document is named using the Barcode Value on the first of the scanned pages.



2. **Batch Separation Type 2** - Each and every page of your batch of scanned pages has a barcode – every time a page is scanned a document is created using the barcode value as the name of the file. If a barcode is read more than once, ScanToPDF will add the page to the existing document (at the beginning, end or any place you configure it)



- 3. **Batch Separation Type 3** - Your documents do not have barcodes so you need a barcoded separator page -every time a separator page is detected a new PDF document is started. The document can be named using the barcode on the separator page, or with other methods using the auto-filenamer.



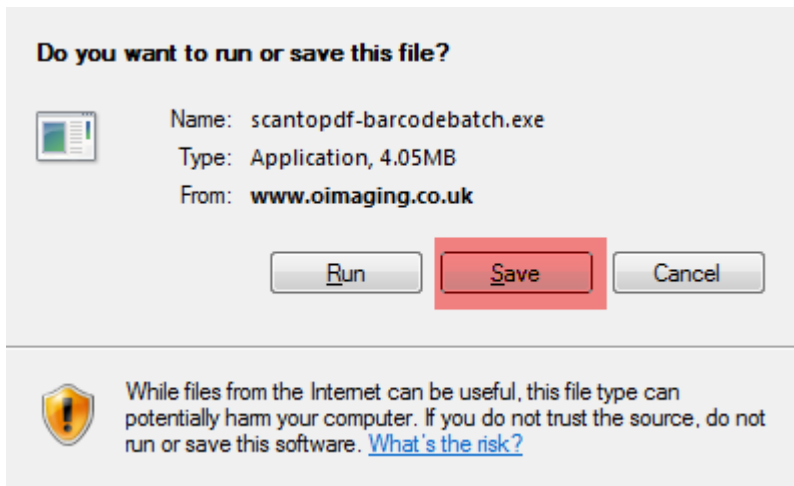
Please note the separator page can be removed or kept in the finished document

HOW TO DOWNLOAD AND INSTALL THE EVALUATION SYSTEM

Click this link

<http://www.oimaging.co.uk/downloads/clientfiles/scantopdf-barcodebatch.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 Batch Scanning 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 batch scanning operation



File namer

FILENAMER SETTINGS

The settings for the filename plug-in will depend on the batch separation type being used.

Filename Format

For types 1 and 2 where the document is named using the barcode values on the document pages the filename format should have the variable {%barcode%}

Example

c:\pdf files\invoices\{%barcode%}.pdf

For batch separation type 3 (using a separator page) the document filename must be configured for some other value using the auto-naming variables available, such as date and time functions or simple incrementing numbers

Example

C:\pdf files\invoices\{%datetime%:ddMMyyyy}\{%increment%:00000}.pdf

Handling Missing Or Un-Read Barcodes

For situations where every page has a barcode, ScanToPDF can be set to handle a missing barcode situation by having separate configuration for documents where a barcode cannot be read. These are configured using the “Error case file name generation” TAB. The filename format in this instance should use one of the auto-naming functions described above.

To speed document processing the “Show file save dialog” option should be left un-checked. If this option is left checked the user will be presented with the file save dialog box.

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



Barcode
recognition

BARCODE RECOGNITION SETTINGS

Type

This will be set based upon the kind of barcode on the document being scanned. The evaluation system uses code39. If you are not sure of your barcode type you can check all types. **See appendix 1 if you do not know what type of barcode your documents have.**

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



Batch
separation

BATCH SEPARATION SETTINGS

The “Save mode is” setting should always be set to “Multiple PDF files per batch”

All other settings need to be set depending on the type of batch separation being used.
For types 1 and 2 (barcodes within document) the settings would usually be

Separation mode:

Fixed number of pages

Page count:

Variable number of pages

Separator page is:

- Barcoded
- Blank
- Black
- ChangingExpression

Include separator page in document

Separator marks start of document

Display error on attempt at producing empty document

Value (leave blank for any):

Expression Syntax:

For type 3 (separator pages), the settings would usually be

The screenshot shows the 'Separation mode' dropdown set to 'Multiple PDF files per batch'. Under 'Fixed number of pages', the 'Page count' is set to 1. Under 'Variable number of pages', the 'Separator page is:' list has 'Barcoded' checked and 'Changing Expression' selected. Below this, 'Include separator page in document' is unchecked, 'Separator marks start of document' is checked, and 'Display error on attempt at producing empty document' is unchecked. The 'Value (leave blank for any):' field contains 'NEWDOC', which is circled in red. The 'Expression Syntax:' field is empty.

The value NEWDOC can be replaced by any barcode value that is used on the separator pages, it can be left blank, in which case any barcode on the document will trigger batch separation. You can download a separator page from our website on the “Downloads” page.

OTHER SETTINGS

All other settings can be set as required by the user and will not affect the batch scanning operation. It should be noted, batch separation can be added to other solutions (document indexing for example). Please contact OiC for further details.

ADVANCED SETTINGS

PLEASE NOTE – THESE ADVANCED SETTINGS ARE PROVIDED IN A ZIP FILE IN THIS EVALUATION (stpddfb-advanced.zip)

Extract the ZIP file to your evaluation ScanToPDF folder. The sample barcode page provided on page 9 is also included in the evaluation folder (ScanToPDF-ExampleAdvancedImage.tif). This can be imported or dragged and dropped into ScanToPDF to test the advanced configuration.

In situations where your documents have several barcodes which may affect naming or batch separation, more advanced settings can be applied to ensure that these barcodes do not cause naming or batch splitting issues.

ScanToPDF uses Regular Expression (RegEx) pattern matching to enable the user to “filter out” barcodes which are not to be used for file naming and put the values into a variable that can be used in ScanToPDF settings. These are set in the RegEx Capture TAB of the barcode recognition settings. We set a variable to capture the barcode value and then use it in the filenameer settings.

EXAMPLE

Although it is not possible to explain all the features of the Regex system (which is a very flexible and powerful system), hopefully this simple example will show what is capable.

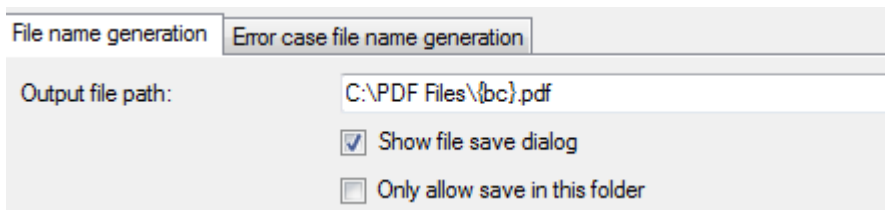
FILENAMER SETTINGS

When we need to use a ScanToPDF variable in any area of the settings we must enclose it in curly braces, our example is going to use a variable called bc so when we use it, it will be typed as {bc}

Change the filenamer to use the bc variable we are going to capture

Start ScanToPDF

- Click Edit
- Click Options
- Click the Filenamer icon
- In the output path box enter c:\pdf files\{bc}.pdf

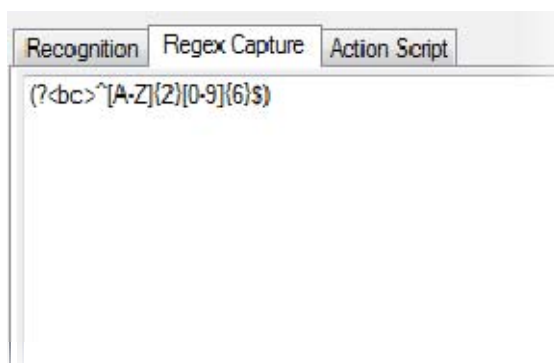


BARCODE SETTINGS

Suppose the barcodes that need to be processed are always the same pattern, for example 2 Alpha Characters and then 6 numeric digits we would enter a regular expression of (?<bc>^[A-Z]{2}[0-9]{6}\$) to instruct ScanToPDF to only match those barcodes that match the pattern and put this barcode value into a ScanToPDF variable called “bc”. Any other barcodes will be ignored unless they match the RegEx pattern.

Here are step-by-step instructions to set this Regex

- Start ScanToPDF
- Click Edit
- Click Options
- Click the Barcode Recognition icon
- Click the “Regex Capture” TAB
- In the text box enter the value (?<bc>^[A-Z]{2}[0-9]{6}\$)
- Click OK to close the settings dialog and then restart ScanToPDF



(Please restart scantopdf after changing regex capture settings)

BATCH SEPARATION SETTINGS

A similar method of Regex pattern matching can be used in the batch separation settings to ensure that only barcodes that match the required pattern are recognized and used to separate the batch.

- Start ScanToPDF
- Click Edit
- Click Options

OiC – ScanToPDF Batch Scanning Setup Guide

- Click the Batch Separation icon
- In the Click the “Regex Capture” TAB
- In the text box enter the value `!^[A-Z]{2}[0-9]{6}$` (Please note the Regex pattern has to be pre-ceded by a ! character as shown below)

Separation mode: Multiple PDF files per batch

Fixed number of pages

Page count:

Variable number of pages

Separator page is:

- Barcoded
- Black
- Blank
- Changing Expression

Include separator page in document

Separator marks start of document

Display error on attempt at producing empty document

Value (leave blank for any):

This instructs the batch separation to only occur when a 2 ALPHA, 6 NUMERIC barcode is present. This will prevent the batch being split inadvertently by other barcodes that may be present in the document.

There are more details about Regex pattern matching on the following web pages

http://en.wikipedia.org/wiki/Regular_expression

<http://www.regular-expressions.info/>

<http://regexlib.com/>

Print out page 9 of this document and scan it. You will notice that despite the page having several barcodes, only the one that matched our pattern was recognized and then used for the filename.

Please contact us if you need any help with Regex. We'll be pleased to help

APPENDIX ONE – DETERMINING YOUR BARCODE TYPE

Start ScanToPDF

Click Edit

Click Options

Click the Barcode Recognition ICON

Select all the Barcode types by clicking each one so that each is ticked as shown below, also set all of the directions.

Recognition **Regex Capture** Action Script

Type: Code 11 EAN13 Code39Extended
 Code39 UPCA
 Code93 Plus2
 Code128 Plus5
 Codabar Postnet
 Inter2of5 Planet
 PatchCode RM4SCC
 EAN8 AustraliaPost
 UPCE IntelligentMail

Direction: Left To Right
 Right To Left
 Top To Bottom
 Bottom To Top

Barcode(s) to read: 1

Colour threshold (default is 0): 0

Granularity (in pixels): 0

Error check
 Image dilate

Click the “Apply” button

Click the “PDF” icon

Copy and Paste the following into the Keywords box as shown below

```
Type={GetBarcode().Type.ToString()}
```

```
Direction={GetBarcode().Direction.ToString()}
```

Document information **Document security** Document restrictions Viewer preference PDF Format

Title:

Author:

Subject:

Keywords:

```
Type={GetBarcode().Type.ToString()}  
Direction={GetBarcode().Direction.ToString()}  
|
```

Scan and save a document with a barcode on. Open the PDF file created using Adobe Reader and use the File , Properties menu in to view the keywords of the PDF document. The keywords will contain the barcode type and direction. You can return to the barcode recognition settings and set the type and direction accordingly. You can then clear the PDF settings made above.