

Scan Pro User Guide



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1 Introduction

This document describes the Scan Pro paper scanning software application. Scanning provides a means of converting paper documents into computer files using a hardware scanner and a computer workstation as shown in the following figure.



Here are some of the advantages of using a scanning program.

1. Find text in a large amount of documents
2. Prepare documents for court (Bates Stamping)
3. Move physical paper to cheaper storage space or remove entirely
4. Share documents over the internet
5. Protect sensitive documents using encryption to make illegal access difficult

The most important part of converting documents into computer readable files is that you can harness the power of the machine to process and store, find and distribute information better than with the manual process of handling paper documents.

You may wonder how the software works. There are 2 very important functions used to create an electronic file. The first part is taking an image (a picture) of each sheet of paper using the physical hardware (scanner). The software then runs a process called Optical Character Recognition (OCR) that converts the picture to machine readable text. Finally the software assembles the information from each page into a Postscript Description File (PDF). The PDF file is an electronic file that is a universal standard. You or people that share documents with you can get a free Adobe Acrobat PDF viewer (www.adobe.com) to look at the documents you have scanned.

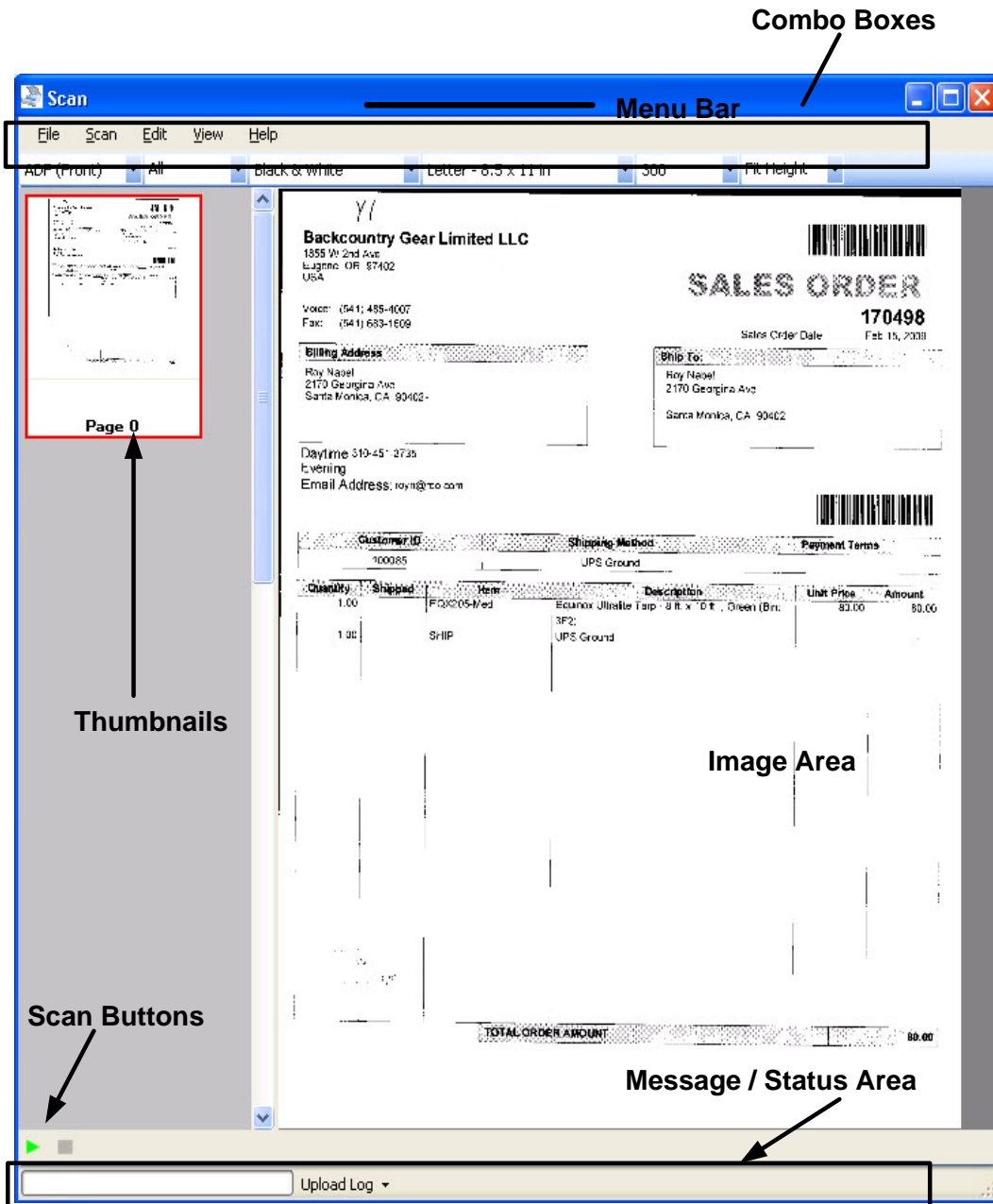
There are related products that work with the Scan Pro product that you may find useful.
Stamp – This product automates the process of stamping the pages of a PDF file
Label – This product is useful for creating cover sheets when you scan to the web

2 Document History

| <i>Document</i> | <i>Author</i> | <i>Date</i> | <i>Revision Description</i> |
|----------------------|---------------|-------------|-----------------------------|
| <i>Userguide</i> | Roy Nabel | 1/31/2000 | Creation |
| <i>Userguide</i> | Roy Nabel | 3/11/2009 | Complete rewrite. |
| <i>Userguide</i> | Roy Nabel | 9/8/2009 | Added zone ocr templates |
| <i>ScanUserguide</i> | Roy Nabel | 12/7/2009 | Major reorganization |

3 Understanding the User Interface

In the following figure you will see that there are several areas you need to learn in order to operate the software.



The following table describes each of the areas.

| Area | Description |
|-------------|--|
| Menu bar | Contains all the scanning commands which you can select with the keyboard or using a mouse. |
| Combo boxes | These are used to control the scanner settings. |
| Status | The message/status area shows you the progress of the OCR conversion and also will post various operator messages. |
| Thumbnail | After a page is scanned the program will create a small thumbnail image and add that image to the thumbnail area located vertically along the left side. You can resize the thumbnail area using your mouse. |
| Image | After a page is scan the program put a large image in the image area. If you are scanning many pages you might want to set the Image area magnification to Fit Height. |

Below the menu bar you will see several combo box menus that control the current setup. The most used combo box is the tray where you will select Front for scanning just the front side of the page or duplex for scanning both sides of the page.

| Control | Description |
|------------|--|
| tray | You can select the scan source of either the tray or the ADF |
| All | This controls how many pages to scan. |
| B&W | You can scan the page in black & white, gray scale or color |
| Both | This controls what page sides to capture (front, back or both) |
| 8x11 std | This defines the paper size |
| 300dpi | This defines the scanning resolution |
| Fit Height | Image area magnification |

If you right click the thumbnail the system will show a menu that allows you to perform common quality control (Q/C) operations such as rescan page, delete page and print a page.

3.1 Thumbnails

Why do you have the thumbnail window?

The thumbnail window gives you an overview of the scanning work you have accomplished up to the current time.

Here are some important things you can do with the thumbnail window.

You can get see how many pages you have scanned.

You can move pages around in case you want to correct the order.

You can delete one or more pages in case you want to rescan them or perhaps you don't want to include those pages.

You can pan and zoom around the currently selected image

Key Concepts

To understand the thumbnail window you will want to understand a few items. First imagine that you have scanned 50 pages. For each page you scanned there is a corresponding thumbnail image ordered just like you scanned starting from page 1 to page 50. The thumbnail window can be resized. At a given moment depending on the size of the window you will have a certain number of thumbnail images. The vertical scroll bar located to the right of the thumbnail window (is visible if the number of images is greater than what can fit into the window). At any given time there is ALWAYS the active thumbnail. This is the large scanned image to the right of the thumbnail window. Note that this image may not be visible in the thumbnail window if you have just used the vertical scroll bar. There is also an active cursor location that is always visible.

The following are helpful indicators.

| Symbol | Indicator | Description |
|------------------------|-------------------------------|--|
| Active Thumbnail | Green Border | There is only one active thumbnail displayed and this is the image displayed in the main window located to the right of the thumbnail window. |
| Selected Thumbnail(s) | Red Border | After you select one or more thumbnails and then select the Edit-Cut operation the system will highlight the selected images in red |
| Drop Zone | Blue Vertical | Used to indicate the drop position when you drag selected thumbnails. This is always a vertical blue bar in front of or after a thumbnail image. There is ALWAYS only one drop zone. |
| Active Cursor Position | Yellow Page Number Background | Shows the current cursor position. The page numbers are in black and the background is yellow. There is ALWAYS only one active cursor position. The active cursor is always visible. |

3.1.1 Basic Operations

The process of selecting thumbnails for an operation like Edit-Delete or Edit-Cut is shown in the following table. Here we show making the selections using a mouse but you can also use the keyboard to perform the same operations.

| Action | Description |
|-------------|--|
| Click | Selects one thumbnail |
| Shift Click | Selects all thumbnails from current selection to the current thumbnail being clicked |
| Ctrl Click | Allows you to select multiple thumbnails not always in a contiguous order |

Table XXX Selecting Thumbnail using a mouse

Once you have selected thumbnail images you will want to do one of the following editing operations.

| Action | Description |
|--------|--|
| Cut | Copy all marked thumbnails to the clipboard |
| Paste | Paste the images stored on the clipboard after the current selection point |
| Delete | When you press the delete key on the keyboard all thumbnails and their associated images are removed |

3.1.2 Using the Keyboard

| Key | Description |
|-------------|---|
| Home | Move to the first image in the current thumbnail window |
| End | Move to the last image in the current thumbnail window |
| Ctrl + Home | Move to the first thumbnail of all thumbnails |
| Ctrl + End | Move to the last thumbnail of all thumbnails |
| ↑ | Move up one row and one column |
| ↓ | Move down one row and one column |
| → | Move right one column with wrapping |
| ← | Move left one column |

| | |
|---------------|--|
| Delete | Delete the currently selected image. Ask for confirmation |
| Page Up | Shows the previous set of thumbnail. For example suppose you have 50 thumbnails total and can see 10 thumbnails in the thumbnail window and the top thumbnail is 30. After you press the Page Up key the top thumbnail will be 20. |
| Page Down | Shows the next set of thumbnail. For example suppose you have 50 thumbnails total and can see 10 thumbnails in the thumbnail window and the top thumbnail is 30. After you press the Page Up key the top thumbnail will be 40. |
| ESC | Pressing the Escape key will un-select all selected images that were going to get cut. |
| Ctrl+a | Select all the thumbnails |
| Ctrl+x | Cut the selected thumbnails |
| Ctrl+v | Paste the selected thumbnails |
| Ctrl+spacebar | Selects the current cursor thumbnail |
| Shift+↓ | Selects all thumbnails from current cursor down one row to same column and updates the cursor position |
| Shift+→ | Selects the next thumbnail |



3.2 Status

3.3 Toolbars

There are several toolbar buttons that can be turned on or off using the View – Toolbars menu



3.3.1 Scanner Control







The following table shows the buttons that control the scanner operation.

| Icon | Name | Description |
|---|-------|---|
|  | Start | Start scanning pages Please make center green |
|  | Stop | Stop scanning pages Please make center red |

3.3.2 Image Control















The following table shows the buttons that control the image view, image processing the current image or merging the vector drawings with the scanned image.

| Icon | Name | Description |
|---|----------|---|
|  | Settings | This activates the image processing side panel settings |
|  | Save | Merge vector drawing with scanned image |

| | | |
|---|------------|---|
|  | Fit page | Fit the scanned image into the current viewing area |
|  | Fit width | Fit the width of the scanned image into the current viewing area |
|  | Fit height | Fit the height of the scanned image into the current viewing area |
|  | Rotate -90 | Rotate the document -90 degrees (counter clockwise) |
|  | Rotate 180 | Rotate the document -180 degrees. Document was scanned upside down. |
|  | Rotate +90 | Rotate the document 90 degrees (clockwise) |

3.3.3 Drawing

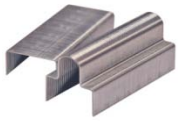



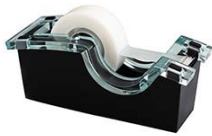



The drawing tools allow you to add vector drawings to the current scanned image. Note that some of the buttons are settings (e.g. line thickness)

| Icon | Name | Description |
|---|----------------|--|
|  | Object Select | This allows you to select one drawing object by clicking on some part of the object |
|  | Pan | This allows you to move the whole scanned image by dragging the hand. |
|  | Zoom | You can drag the magnifying glass on an area you want to enlarge. |
|  | Area Selection | Drag this rectangle over an area to select the drawing objects that are contained within the border of the area selection rectangle. |
|  | Text | Place text on the scanned image |
|  | Line | Draw straight lines. Note you can set the line thickness, line color and end arrows with the line property buttons. |
|  | Pencil | This allows you to draw free form lines. The color and line thickness are set with the line color and line thickness button. |
|  | Picture | You can add a bitmap picture file from any computer folder you can access on the current scanned image. |
|  | Rectangle | This draws a rectangle with a solid color. |
|  | Font Property | This button sets all the text font properties (font, size, color, italics and bold). |
|  | Fill Color | This button sets the fill color. |
|  | Line Color | This button sets the line color. |
|  | Line Thickness | This button sets the line thickness. |
|  | Line Arrows | This button sets the line arrow heads at start and end of the line. |

4 Preparing a Document

Before you start any scanning you have to prepare documents for the scanner. This will save you so much time in the long run that is well worth the effort.

First go through the document and remove the following items shown in the next table. You want to remove anything that might jam in the scanner.

| | | | |
|---|---|--|---|
|  |  |  |  |
| NO STAPLES | NO CLIPS | NO CLIPS | NO POST ITS |
|  |  |  |  |
| NO TAPE | NO BIG STAINS | NO FOOD | NO ENVELOPES |

Make sure that the pages are not bent or too wrinkled. This may take some rolling or you might have to flatten the document by placing a large weight on top for a couple of hours.

You want to go through the document and make sure that each page is separate and is not stuck to another page. A common technique is to fan the pages. You grab one side of the document and then on the other slide your thumb trying to separate the pages.

Unfold any pages like maps, diagrams or large spread sheets.

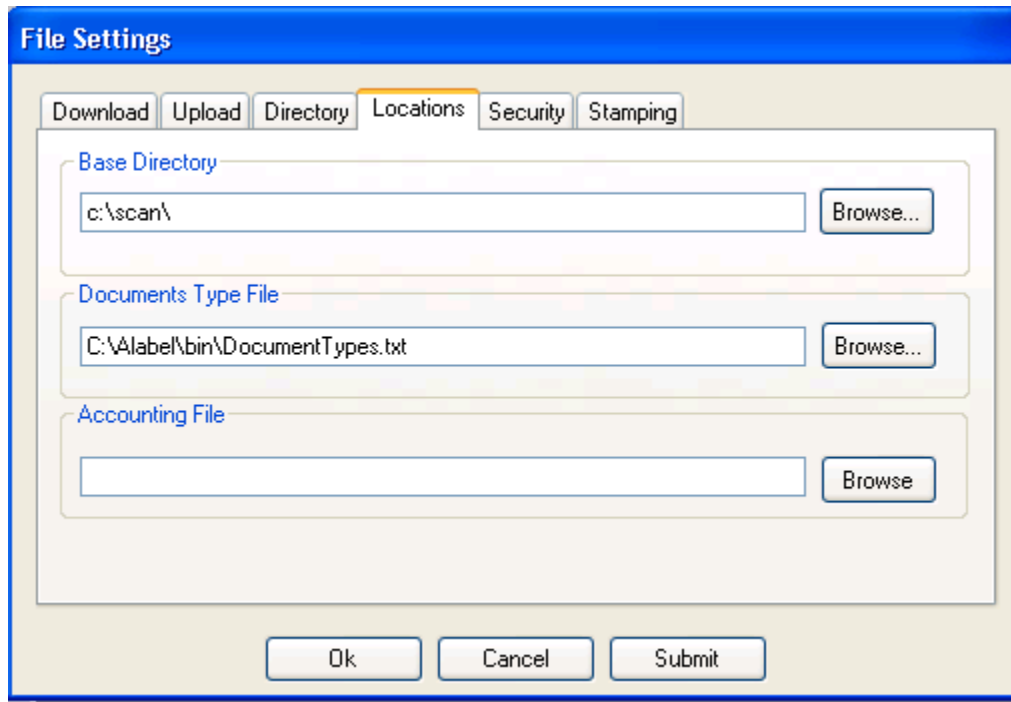
Look for very thin paper if you are scanning old documents. These should be done on a flat bed scanner and manually inserted.


If you do have to tape objects like small receipts or checks to a page make sure you only tape on one side of the paper and the object is centered on the page. Make sure the tape is firmly pressed down and you should have at least one piece of tape on the top side.

5 Scan a Local Document

When you scan a document that you want to save on your local hard drive you first prepare the document for scanning and feed the document into your scanner.

Under the Scan Tab choose File Settings and then click the location tab. You want to make sure the Base Directory is set to where you want your documents to go.



Then click the green triangle button  located at the bottom left of your display screen. The scanner will start scanning and create thumbnails. You may see the following dialog box if you have any barcodes on the page. Just click the Submit button.

Cover Dialog

Detection Data

Record Type:

RMS Document Number:

Directory Storage Location:

Record Series:

Document Date:

Link Field Barcode:

Please select one of the following actions

- This is not a cover sheet keep scanning
- All detection data is good keep scanning
- Make changes and keep scanning
- Stop scanning

When all the sheets in the document have been scanned you want to make sure that the “Done scanning – Save File” radio button is selected.

ContinueScan

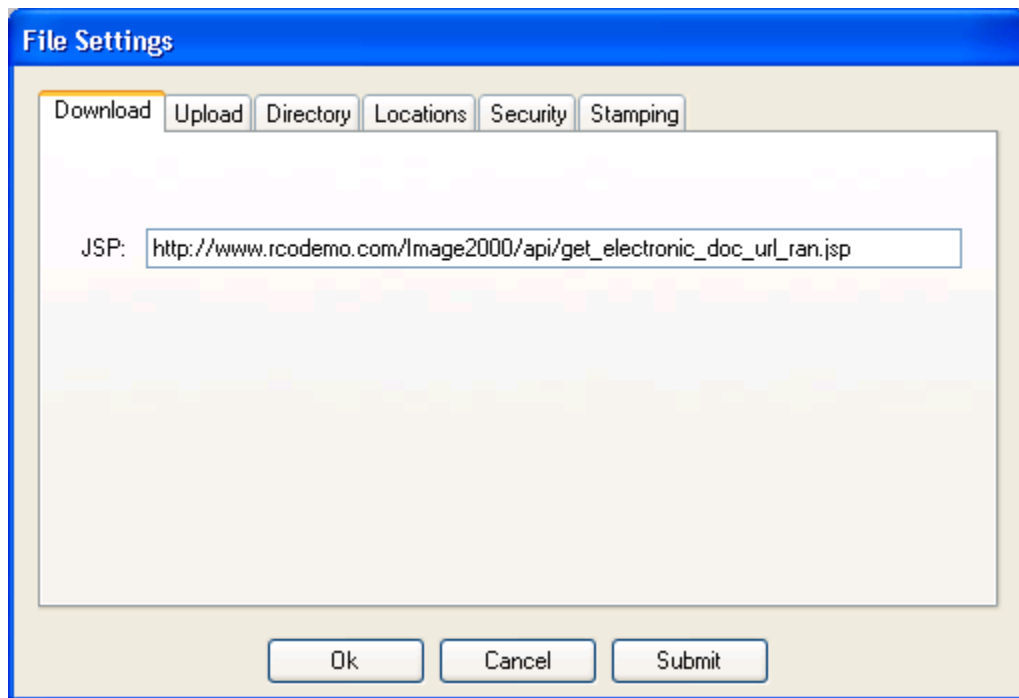
- Operator will add paper for current document
- Operator will add paper - Start new document
- Done scanning for now
- Done scanning - Process and upload
- Done scanning - Save File

Click the Submit button and the system will prompt you for a directory location.

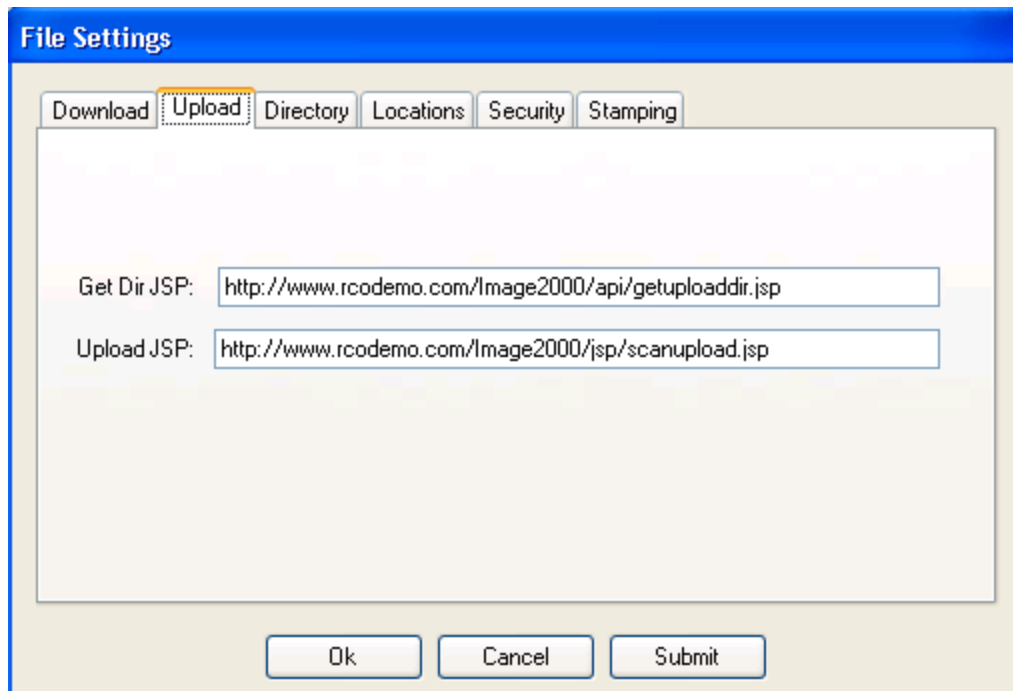
6 Scan a Document to the Web

Before you can scan a document to the web you have to create a cover sheet which is described in the Label program documentation. You also need to have the file settings correct. This is in the Scan Menu File settings. Please contact RCO when you do the web setup and they will provide you with the strings needed in you Upload and Download tabs. This information will allow you to save documents to the web and also read and edit documents already on the web.

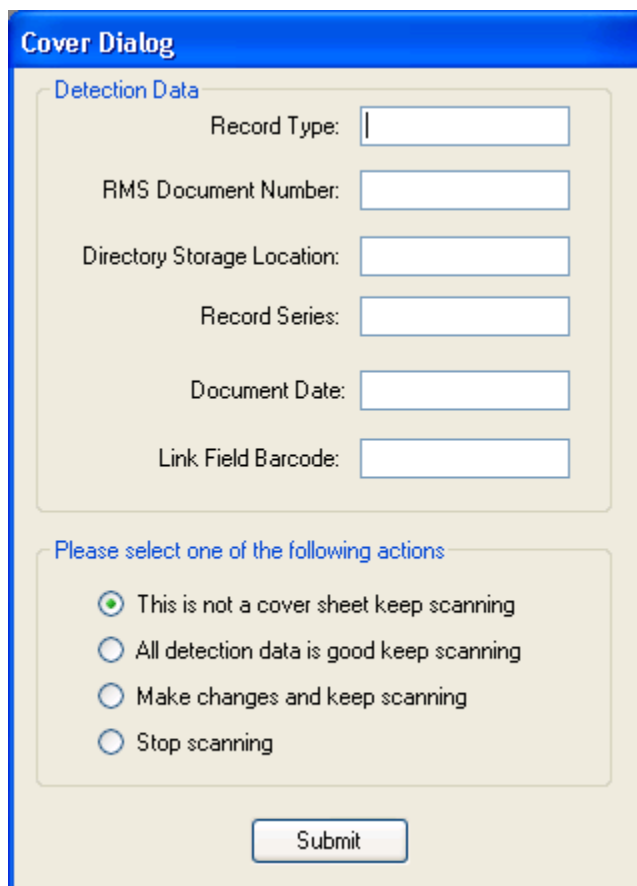
You need to set the Download tab.



You also have to set the upload tab.



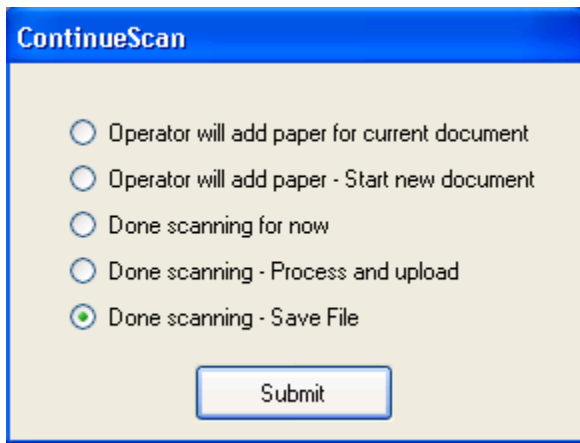
Once you have the tabs setup then you add a cover sheet to your document. You will see a cover dialog appear after the cover sheet is scanned.



If you need to make changes then click the Make changes and keep scanning radio button and then click the submit button.

If everything is good (all the information in the edit boxes match the cover sheet) then check the All detection data is good and keep scanning radio button and then click the submit button.

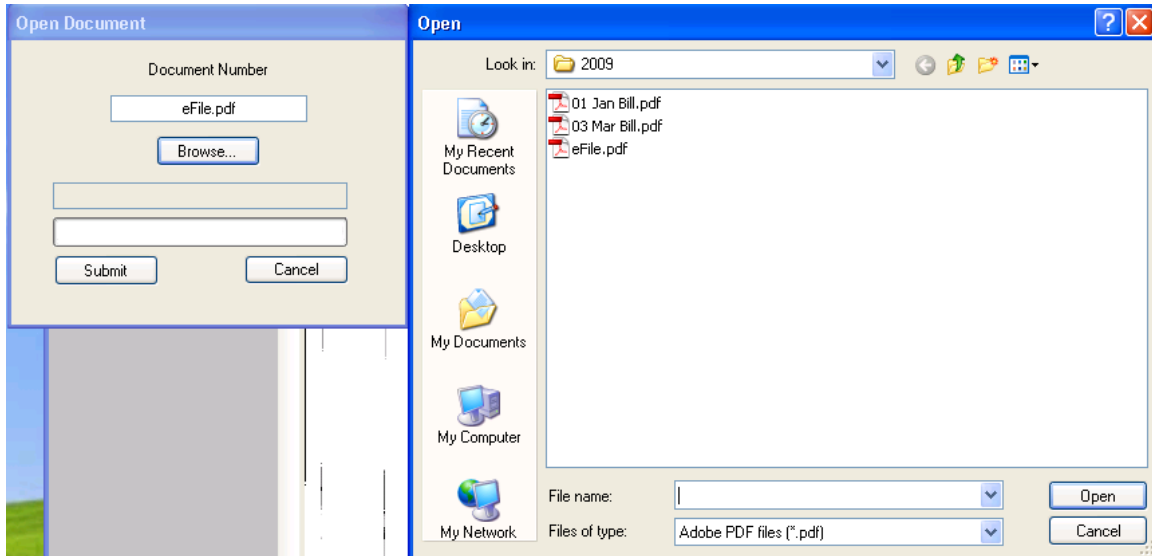
When you get to the end of the document the system will display the end dialog



You should click the Done scanning – Process and upload. At this point the system will assemble the PDF and upload the document to the correct web address. Depending on the speed of your connection and the size of the document this can take time.

7 Open / Edit a Local Document

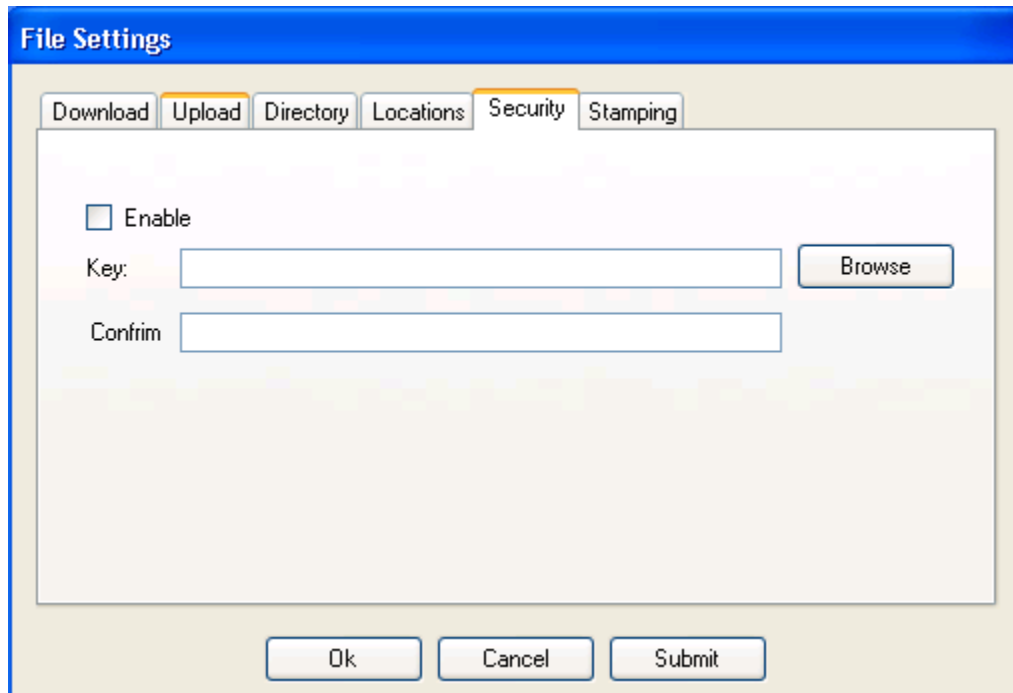
Sometimes you have scanned a document but then you need to add or remove a few pages. Under the File menu choose the Open local document and you will see the Open Document dialog (left side). Click the Browse button and you will see the Open dialog on the right. Pick your file and click the Open Button. Then click the Submit button and the program will read your file.



You can then click on a thumbnail where you want to add pages and then choose Scan Insert and Append commands. You can also use the Edit menu to pick various commands to delete pages or cut and paste them to different locations within the document.

8 Protect a Document

You can use encryption to protect a document. Under the Scan Menu select the File setting and then click the Security tab from the following dialog.



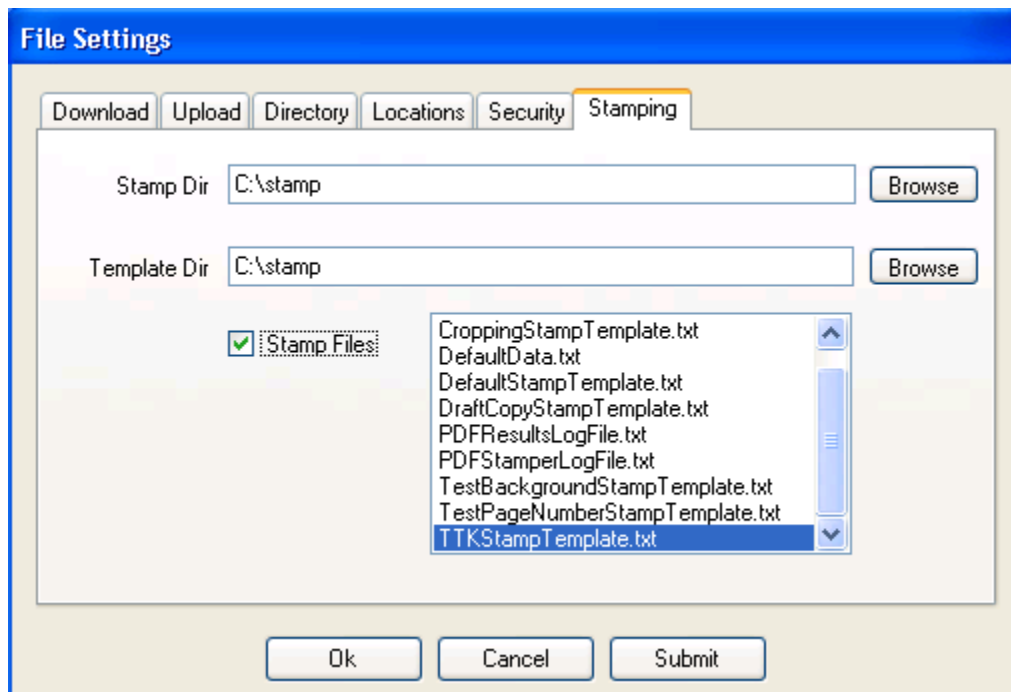
The image shows a 'File Settings' dialog box with a blue title bar. It has several tabs: 'Download', 'Upload', 'Directory', 'Locations', 'Security', and 'Stamping'. The 'Security' tab is selected. Inside the dialog, there is a checkbox labeled 'Enable'. Below it are two text input fields: 'Key:' and 'Confirm'. A 'Browse' button is positioned to the right of the 'Key:' field. At the bottom of the dialog are three buttons: 'Ok', 'Cancel', and 'Submit'.

You have to check the Enable box and add the SAME password in both the Key and Confirm boxes. Note you have to use the same case since the password is case sensitive. You must remember the key!

9 Stamp a Document

If you only have one document to stamp first use the Stamp application to design a stamp template. Under the scan menu File menu choose the File settings command and then click the stamp tab. You will see the following dialog.

*** Note that if you have many documents to stamp especially Bates Stamp then we suggest that you do the following. First do your normal scanning. Then organize all your documents that you want to stamp in a production folder. You can have sub folders. Then use the stamp program to stamp all the documents at once.



10 Special Operations (OCR)

Optical Character Recognition known as OCR for short provides several advantages. Some copy machines produce PDF files but they are only images and you can do a full text search to find words. Scan Pro takes these PDF files and makes them searchable. If you have every done data entry for quick books you may have wondered if there was a faster way to enter invoices that have line items. Scan Pro simplifies the data entry process.










While you may have to design ocr zone templates for your various bills and invoices the effort is worth the reward in less typing and more accurate data entry. In the following sections you will learn how to create templates, checking data entry coding, upload to QuickBooks and also how to convert copy machine PDF files to searchable PDF files.

10.1 Working with OCR Zones





The primary purpose of the zone ocr system is to enable you to convert paper bills and get them entered into your Quick Book accounting system. In order to use the zone ocr process you have to do a few steps.

1. Create zone ocr templates names for each type of bill you receive.
2. Draw all the zones for a given template and give each zone a name (e.g. Amount)
3. Do the Zone OCR operation and make corrections if needed.
4. Upload the information to Quick Books

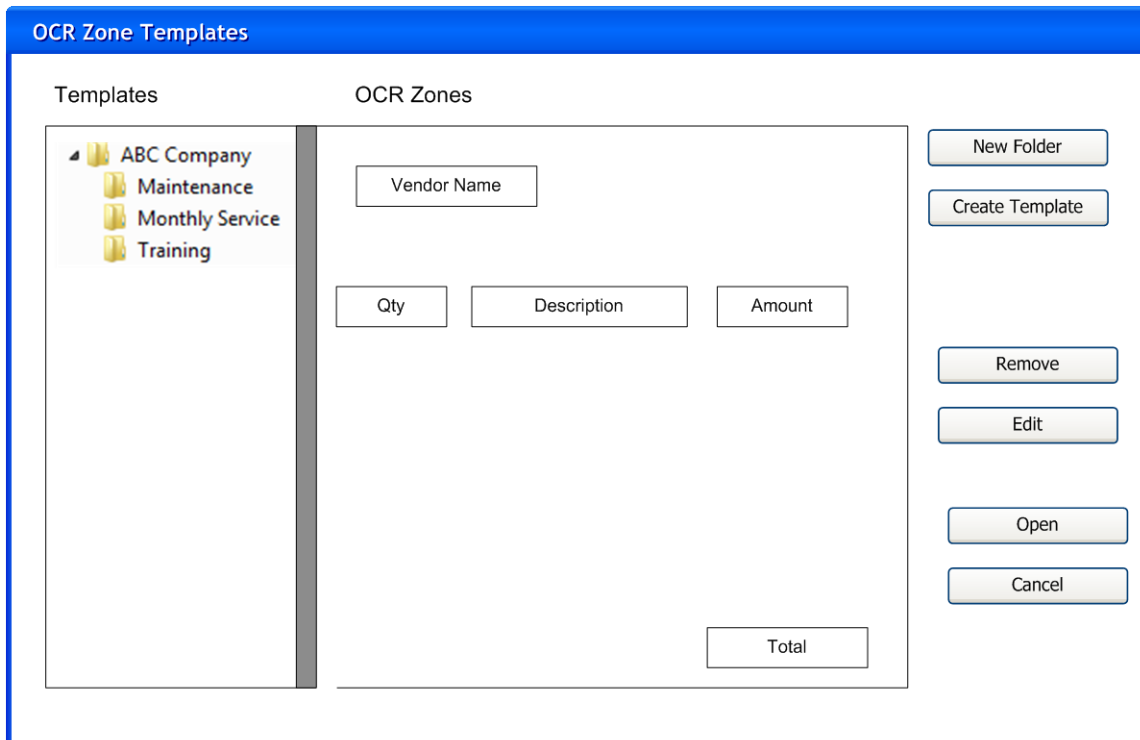
Once you get the template structure and the zones created from then on you will just open the template you want, check the OCR process and upload the information. There is a zone ocr toolbar that has buttons that will do you most common functions.

| Icon | Name | Description |
|---|---------------------|--|
|  | Design Mode | When design mode is selected each rectangular zone drawn will be names with text box control |
|  | New Folder | Create a new folder in the templates directory window |
|  | New Template | Create a new zone ocr template |
|  | Find Template | Find an item in the templates directory |
|  | Delete item | Delete item selected in templates directory window |
|  | Quickbooks Upload | Upload the coding information to quickbooks and create invoices |
|  | Templates Directory | Show / Hide the templates directory window |
|  | Coding Window | Show / Hide the coding window |
|  | Process Zones | Ocr each zone on the current image and add to the coding page |

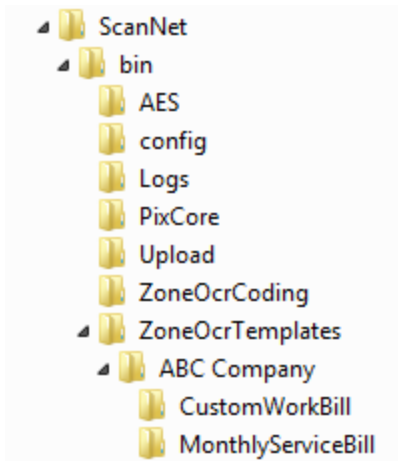
10.2 Creating Zone OCR Templates

To create a zone ocr template click the design mode button in the toolbar . This will open the template directory window. You have to create at least one folder to hold your templates by clicking the new folder button in the toolbar . You create a zone ocr template by clicking the new template button in the toolbar . A template must be created in a folder. You can delete anything in the template directory by clicking the delete icon in the toolbar . ***Note be careful if you delete a folder with many templates as these will also be delete all the items contained in the folder. The system will prompt you with a dialog asking if you are sure.

To create a zone template you will use the following dialog which is activated from the File Menu / OCR Templates.



All OCR templates are stored in sub folders under the folder ZoneOcrTemplates.



Once you have created the folder structure for your templates you can select a particular folder and then click the create template button.

When you click the create template button the mode combo box located in the toolbar will change to design. This indicates that the objects you draw will be names and associated with the currently selected template. You can name the zones and then click the save template button on the toolbar when you are finished.

10.3 Coding a Zone OCR Template

When you have a zone ocr template selected and the coding window enabled you will see the following figure. The system will start processing the zones and fill in the edit boxes. You can manually make changes to the edit boxes and then click save to store the coding information in the folder called *ZoneOcrCoding*.

The screenshot shows a software interface for managing OCR zones. It is titled "OCR Zones (ABC Company – Maintenance)". The interface is divided into two main sections by a vertical splitter. On the left side, there are several input fields: "Vendor Name", "Qty", "Description", "Amount", and "Total", each with a corresponding text box. Below these fields is a "Save" button. On the right side, there is a "Vendor Name" field at the top. Below it is a table with three columns: "Qty", "Description", and "Amount". At the bottom right of the right pane is a "Total" field.

Zone Name uses shortened path if too long.

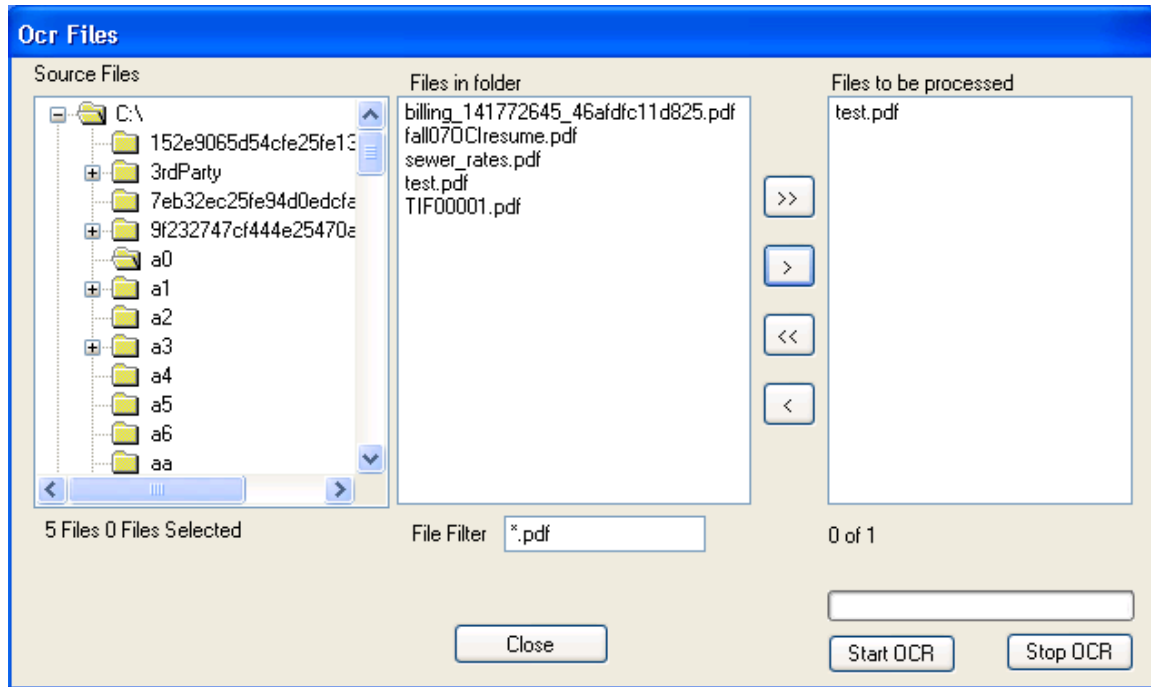
The vertical splitter can be dragged horizontally

10.4 Working with QuickBooks

When you click the quickbooks button in the toolbar the system will upload all the coding information and create invoices.

10.5 OCR a PDF

Sometimes you might want to OCR a PDF file that has been produced by a copy machine or an application that does not have OCR capabilities. Under the File menu you will see an item called OCR files. If you select this command then you will see the following dialog.



First you select the folder you want to process and then add the files in the File in Folder list to the Files to be processed list. The > adds one file at a time or you can use the >> to add all the files. Click the Start OCR button to start the conversion process.

The following table shows the meaning of all the buttons.

There are several buttons in between the two lists which allow you to add or remove files to OCR. The following table shows you the meaning of each button.

| Button | Name | Description |
|-----------|------------|--|
| >> | Add All | Add all files in the Files in folder list to File to be processed list |
| > | Add One | Add one files in the Files in folder list to File to be processed list |
| << | Remove All | Remove all files in the Files to be processed list |
| < | Remove One | Remove one files in the Files to be processed list |
| Close | Close | Removes the dialog from the display screen |
| Start OCR | Start OCR | Start the OCR Conversion process |
| Stop OCR | Stop OCR | Stops the OCR Conversion process |

11 Summary

Please contact us at any time if you have problems or suggestions. Most of the product improvements come from customer suggestions.

In United States: 800-972-3027
Outside United States: 310-451-3735
Email: royn@rco.com

We hope you enjoy the product!