

Alaris

Info Input Express Limited Edition

User's Guide

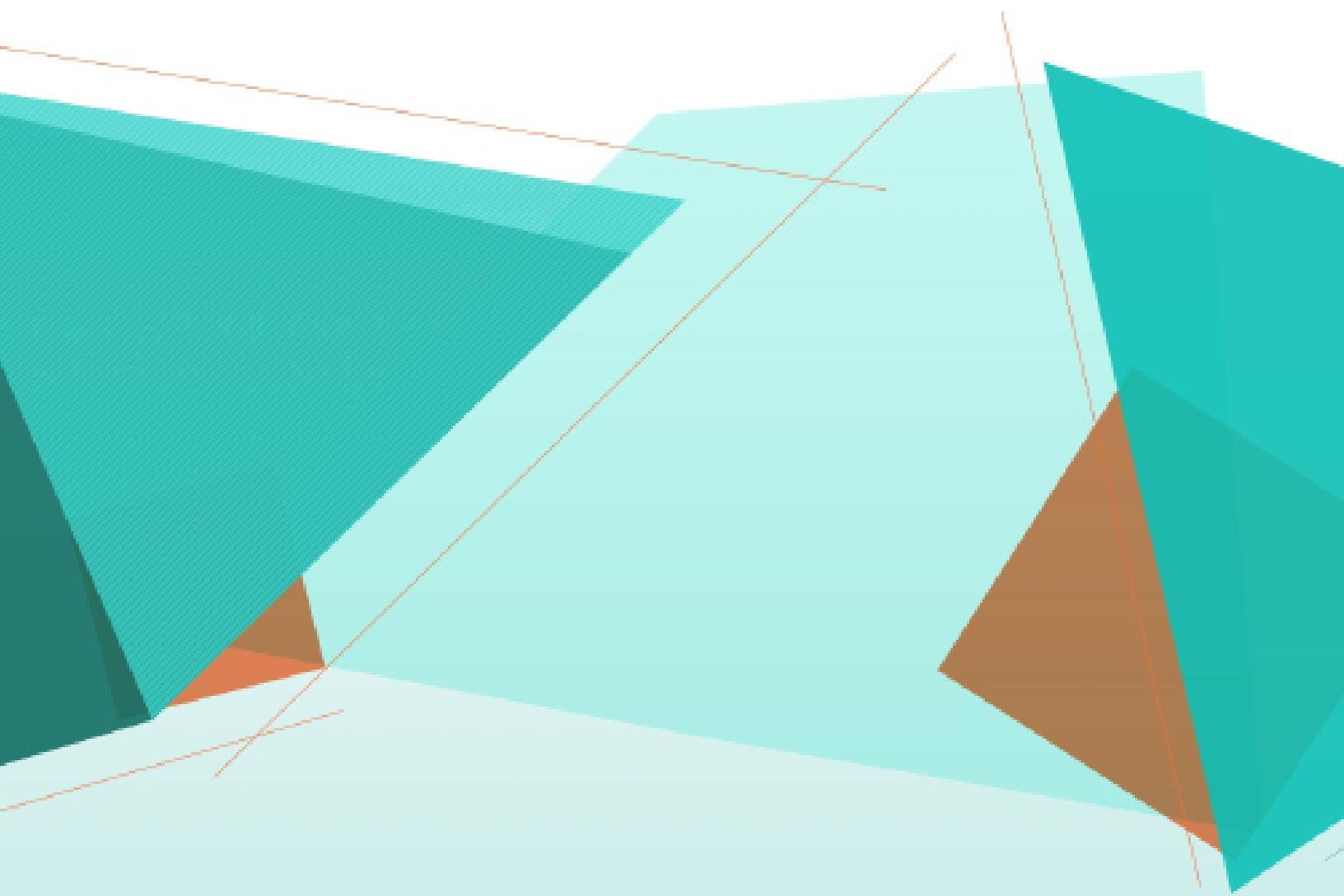


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Using Info Input Express to Create and Retrieve Documents

Info Input Express (IIX) Limited Edition software is an input management system designed to simplify the capture and retrieval of information from paper documents.

Info Input Express software is accessed via a web browser interface. The software allows you to define how different kinds of input documents will be processed.

From the Home screen of Info Input Express, you will select the tile for the desired activity, scan your pages, do basic image editing and indexing if needed, and submit the images. Info Input Express will process and output files in the location specified. The output file may contain one image (for instance, the front side of a check) or many (the images of all pages of a loan application). The output files can be retrieved and used for your business processes. Important data stored with each file can be accessed without having to open the output file.

For help in using an existing IIX activity, see [Accessing Info Input Express](#).

For help in setting up a new IIX activity, see [Setting up an Activity](#).

Compatibility

Info Input Express may be used with the following browsers:

- Chrome
- Internet Explorer 11
- Edge
- Firefox

Info Input Express may be used with any Kodak or Alaris scanner.

Contents of this Guide

This guide provides procedures for:

- setting up destinations for the output files
- creating activity definitions that will convert your documents into information useful to your business
- scanning images to create document files
- saving index information
- creating output files of your documents

- retrieving output files and their information
- problem solving

If you encounter issues with your scanner (e.g., scanner not working, document jam, etc.), refer to the User's Guide for your scanner.

For detailed information how to use IIX, refer to the following topics:

[Accessing Info Input Express](#) - how to use the Home page

[Image Input](#) - adding images by scanning

[Document Editing](#) - how you can use the Capture screen to change document content

[Indexing a Document](#) - adding text information to a document

[Searching the Catalog](#) - retrieving output documents and index information from within IIX

[Status Page](#) - checking whether documents have finished output

[Creating an Activity](#) - adding or modifying an activity (job) setup that can be used from the Home page

[Problem solving](#)

Terminology

Activity - The defined and named setup to produce a kind of document created in Info Input Express. The same as a Job Setup in Capture Pro Software. Similar to a scanning profile or shortcut in a scanner driver, but with more kinds of settings available (e.g. Index items).

Catalog - A list of the document files that have been output by Info Input Express, with capabilities for searching and sorting the documents and viewing the files and their index information.

Destination - A location in which IIX output files can be stored.

Document - A set of one or more images, optionally with index data, that is output as a file.

Document type - A set of index items created in Setup. A document type is a convenient way to add multiple index items (and relationships between them) to an activity setup.

Index item - A data entry field in which a user can add document information that may be useful for searching or sorting output documents, or in a document management system.

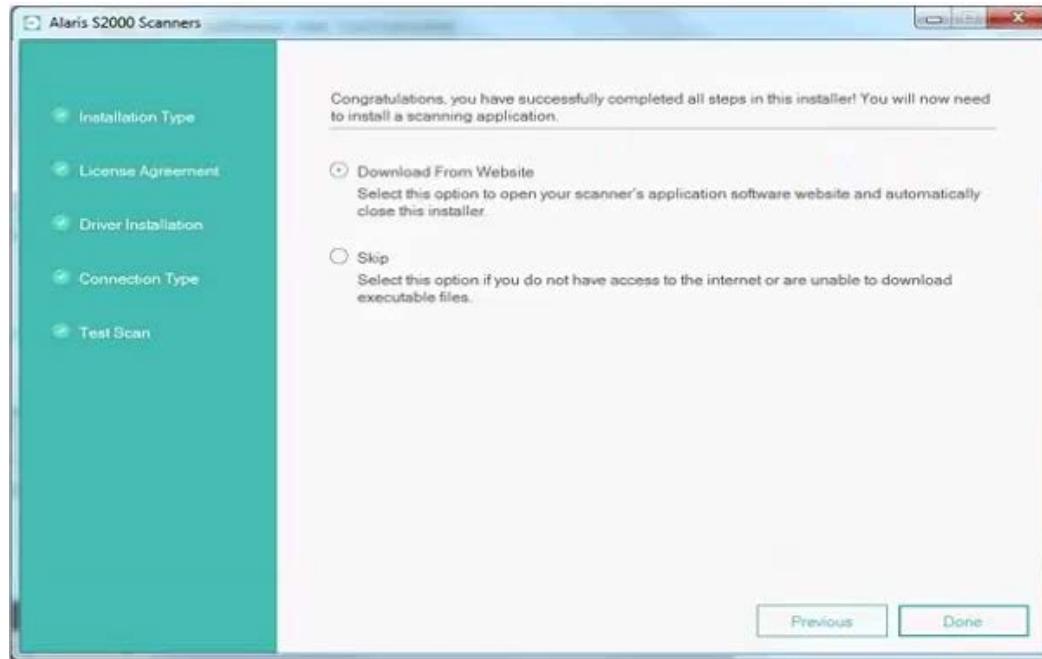
Profile - Profile and Setting Shortcut are used interchangeably: a collection of settings for the scanner, including image resolution, color, sides to scan, and image processing features.

Shortcut - Setting Shortcut and Profile are used interchangeably: a collection of settings for the scanner, including image resolution, color, sides to scan, and image processing features.

Tile - A color-coded rectangle on the Info Input Express Home page, which contains an activity name, number, and icon.

Installing Info Input Express Limited Edition

During the install process for your scanner, you will see Download instructions in the Scanner installer. Choose **Download from Website** to download Info Input Express Limited Edition. (The Support page for your scanner also has a link to the download page.)



The download link takes you to a site where you must register. Registration requires a valid email address and scanner serial number. Turn the scanner upside down. The number on the barcode label is the serial number.

After registering, you will receive an email with a link to the page where you can download Info Input Express LE. Save IIX LE to your computer.

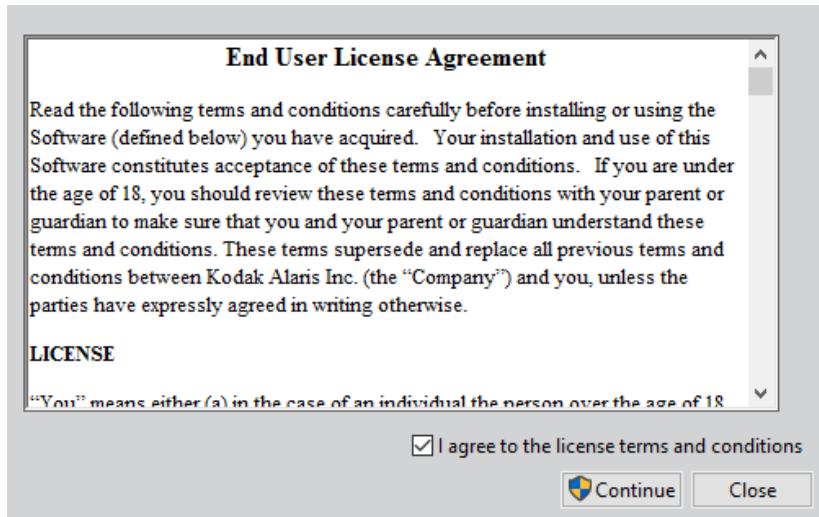
Do not try to open or run the installer from the download page.

When the download is complete, run the installer: double-click on the file in your **Downloads** location, or right-click and choose **Run** or **Open**.

The first screen of the installer allows you to proceed with install or exit. Click on **Install**.

Install **Close**

Review the End User License Agreement and agree to it, if you want to use IIX LE.
Continue.



The installer screens that follow will show installation progress.

Info Input Express
Limited Edition

Alaris

Processing: Info Input Express Software Support Libraries

Cancel

The final screen says that installation was successfully completed. **Launch** to open IIX LE in your browser; or **Close** the installer without launching.

Info Input Express
Limited Edition

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Installation Successfully Completed

Launch

Close

See [Accessing Info Input Express](#) for the different ways you can launch IIX LE.

Basics of Info Input Express

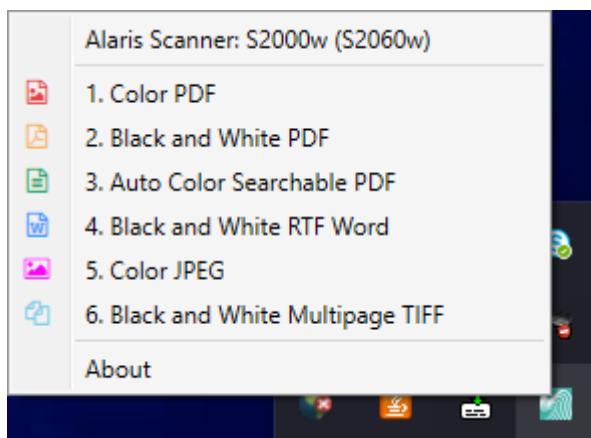
Accessing Info Input Express



To start Info Input Express Limited Edition in your browser, double-click on the desktop shortcut or navigate to **localhost:9000**. Add this location to your browser favorites/bookmarks.

The desktop shortcut appears after IIX LE has been installed.

You can start using Info Input Express by right-clicking on the IIX icon in your system tray and choosing a shortcut from the list.

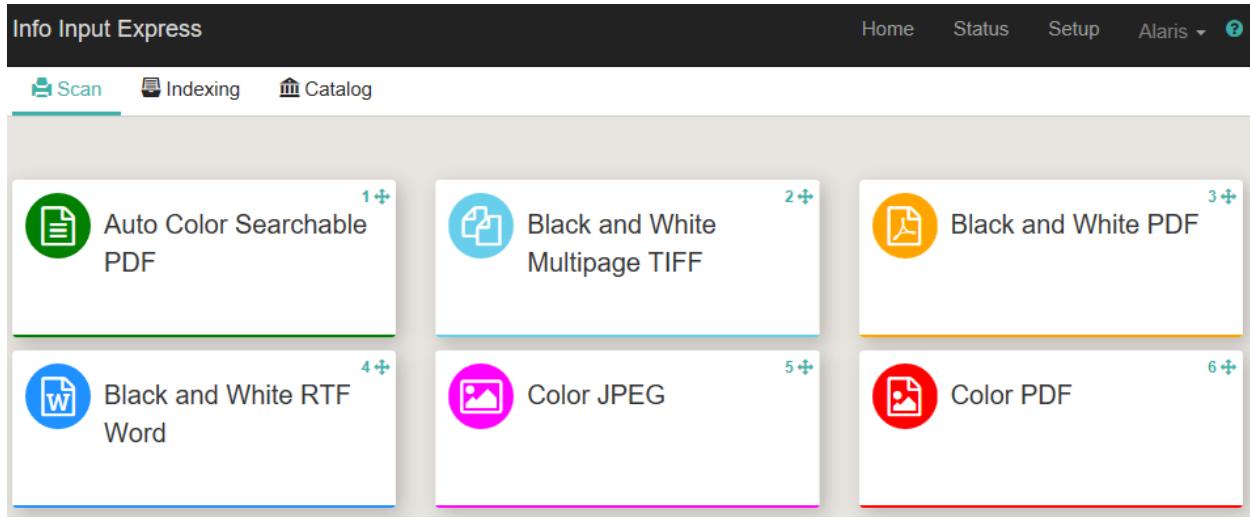


You can also initiate scanning into IIX by choosing a shortcut on your scanner screen.

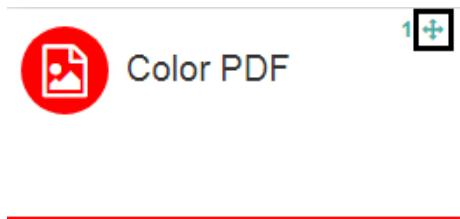
The Info Input Express Home page

Info Input Express allows you to use preconfigured activities to scan documents to a destination.

To begin open Info Input Express. The Home page will be displayed with the activities and features available.



To change the order of your activity tiles, click on the "move" icon on the tile. Drag the tile to the desired position on your Home page. The number assigned to the tile will change to match the new position.



The Home page also has a [Menu bar](#) and a [Title bar](#).

Menu bar



The menu bar provides the following options:

- **Scan** — displays the activities that are configured for scanning
- **Indexing** — displays the activities that have documents waiting for you to complete input and submit the documents for output.
- **Catalog** — lets you retrieve documents that have been created in Info Input Express and see their index values.

See also:

[Home page](#)

[Indexing a document](#) (record important information)

[Retrieving output from the catalog](#) (access output documents)

Title bar

The title bar is visible from any page in Info Input Express. It provides these options:



Home — returns you to the [Home page](#). You can also click on the Info Input Express name in the title bar to return to the Home screen.

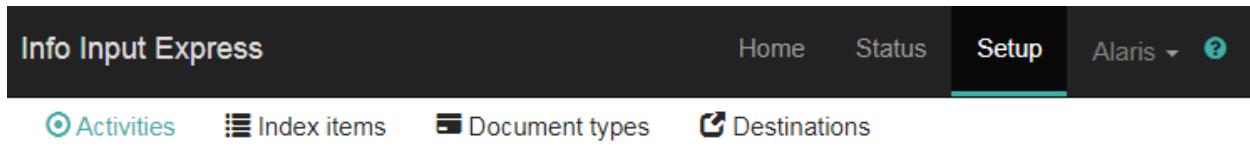
Status — displays the [Status page](#) where you can view the status of documents.

 If the Alert icon appears on Status, it indicates an error condition. Clicking on the icon will display the Status screen where you can view the error. See [Problem Solving](#).

Setup — takes you to the [Activities setup](#) screen and [all other setup functions](#).

User menu — when you click the down arrow near the right end of the menu bar, the [User menu](#) will be displayed.

Setup Menu

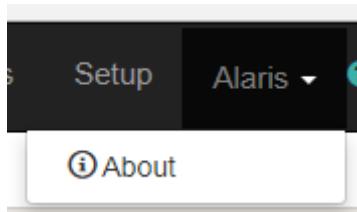


The **Setup** menu option on the title bar provides access to multiple functions in Info Input Express. You can create or edit:

- [Activities](#) (the tiles on the Home page)
- [Index items](#) (information to be stored with the documents produced by IIX)
- [Document types](#) (sets of index items that apply to different kinds of documents)
- [Destinations](#) (where output documents from IIX will be sent)

User Menu

The User Menu is in the title bar; it contains a drop-down arrow.



About — takes you to the [About screen](#).

About Info Input Express

The screenshot shows the 'About' screen for 'Info Input Express LE'. At the top left is the product name 'Info Input Express LE'. At the top right is the 'Alaris' logo with a small 'x' icon. Below the title, the text 'Version: 2.2.0.7' is displayed. There is a checked checkbox for 'Allow Alaris collect anonymous usage data to improve this software. (No personal information will be sent.)'. Below this is a large block of copyright and license text from various software companies. At the bottom left, there is a copyright notice: '© 2017 Alaris Inc. TM/MC/MR: Alaris'. At the bottom right, there are links for 'License Agreement' and 'Software Guide'.

Info Input Express LE

Alaris

Version: 2.2.0.7

Allow Alaris collect anonymous usage data to improve this software. (No personal information will be sent.)

This product includes OmniPage® OCR software © 1995-2012 Nuance Communications, Inc. All Rights Reserved. Copyright 2000-2011, AllMyPapers, All Rights Reserved. LibTiff.Net, Copyright © 2008-2011. Bit Miracle, All rights reserved. LibJpeg.Net, Copyright © 2008-2011. PDFsharp, Copyright © 2005-2009 empira Software GmbH, Cologne (Germany). ImageTools, Copyright © Sebastian Stehle. iTextSharp, Copyright © 1999-2009 Bruno Lowagie and Paulo Soares. iTextSharpSL, Copyright © 1999-2009 Bruno Lowagie and Paulo Soares. LibTiff, Copyright © 1988-1997 Sam Leffler, Copyright © 1991-1997 Silicon Graphics, Inc. Zip, Copyright © 1990-2009 Info-ZIP. All rights reserved. ZLib, Copyright © 1995-2012 Jean-loup Gailly and Mark Adler. Boost Software License - Version 1.0 - August 17th, 2003 This software is based in part on the work of the Independent JPEG Group.

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[License Agreement](#) [Software Guide](#)

The About screen for Info Input Express provides:

- Version of your IIX software
- Permission to collect statistics about which product features are used
- Third party licenses
- Copyright
- Link to the License Agreement
- Link to the Software Guide

Create and Retrieve Documents

Adding Images to a Document

Image Input Creates a Document

You can create a document in several ways, using Info Input Express:

[Use the activity tiles on the Info Input Express home page.](#)

[Choose an activity name or number from your scanner screen.](#)

[Use the Info Input Express icon in your system tray.](#)

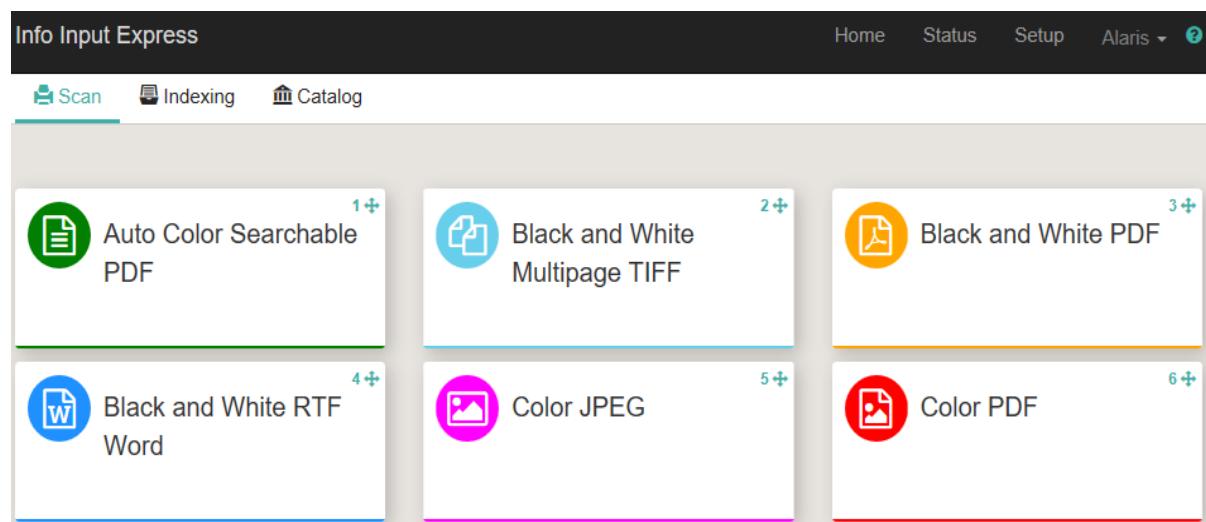
Scanning with the Home Page Tiles

You can scan to add images to a document in Info Input Express.

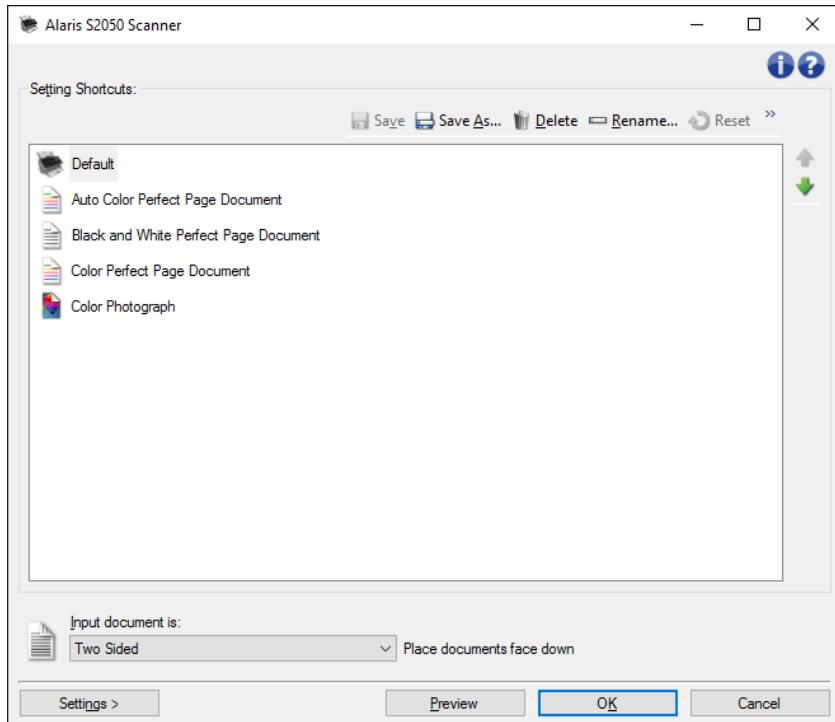
Scanning

Before you begin, be sure your scanner is turned on and ready, and the pages to scan are in the scanner input tray.

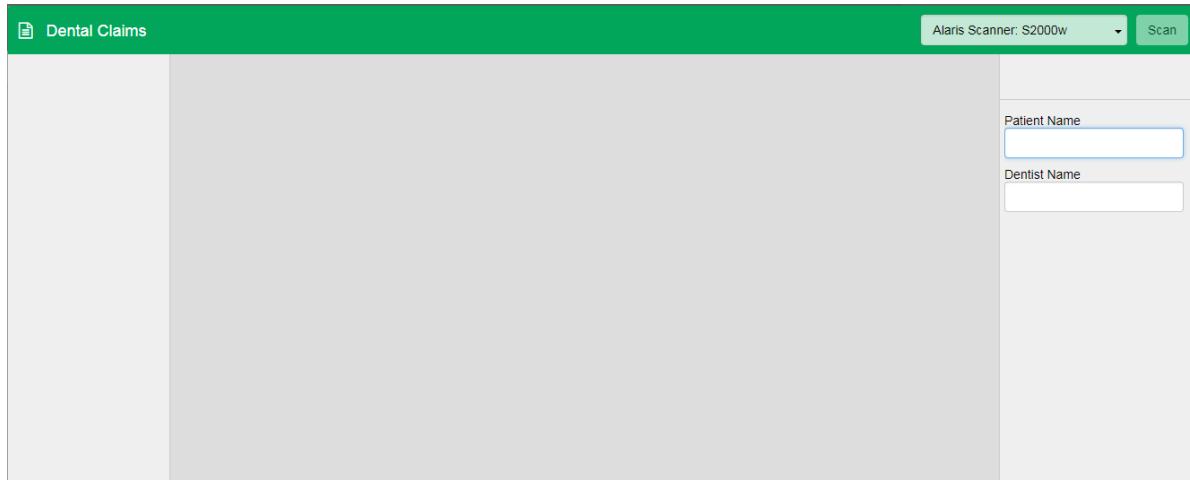
Click the desired activity to start scanning.



If the activity you select is configured to display your scanner's software user interface, you will not see the [Capture screen](#) until after you specify the scanner settings for this activity. If this is the case, select the desired scan settings.



The Capture screen will be displayed.



Scanning will begin if the scanner is ready and paper is in the scanner input tray.

- If no paper is in the tray but you want to scan, prepare your pages, put them in the tray, and click on the **Scan** button.
- As pages are scanned, the images will be displayed in the Thumbnail pane. The first image will be in the center pane.

See also:

[Capture screen](#)

Scanning into IIX from the Scanner Screen

You can scan images into Info Input Express directly from the scanner, even if Info Input Express is not open in your browser.

Information from the activity tiles will appear on your scanner screen. For some scanners, the activity name may be displayed on the scanner screen. For other scanners, only the number will be displayed.



In this example, if you choose B&W PDF or 2 on the scanner screen and push the scan button on the scanner, Info Input Express will be opened (if not already open), the Capture screen for the B&W PDF activity will be opened, and images will be displayed as pages are scanned.

If you are scanning from an Alaris S2060w or S2080w scanner that is enabled for shared scanning, the menu bar of IIX will have a field where you can enter a 4-digit PIN

Scanner PIN: . The PIN is optional. If you choose to use a PIN, then when you go to the scanner and choose your user name on the scanner screen, you will receive a display on the scanner screen where you can enter the PIN. Then you can choose an activity name/number and scan your document.

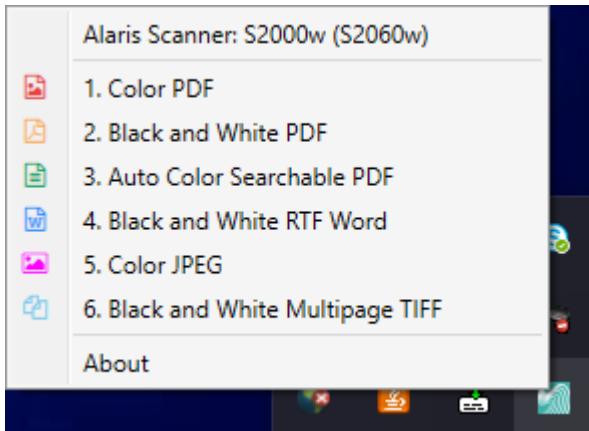
Only 10 users will have access to their activity names/numbers on the scanner screen.
Up to 20 activities will be displayed on the screen, per user.

See also:

[Capture screen](#)

Scanning into IIX from the System Tray

To scan from the system tray, display the system tray and right-click on the Info Input Express icon. 



Select an activity from the list, to open the Capture screen and initiate scanning.

See also:

Capture screen

Working in the Capture screen

Capture Screen

From the Capture screen you can

- **Scan**, to add more images to this document
 - [Edit the document](#)
 - [Add index data](#)

- **Submit** the document for processing and output
- **Cancel** to discard the document and return to the Home screen.

Document Editing

Once you have images in your document, you can edit the document in various ways: re-arranging images, rotating images, or splitting into more than one document.

If the activity is not set up to allow document editing, the document will be auto-submitted as soon as image input ends.

Thumbnails

When documents are scanned, the images will be displayed in the Thumbnails pane.



These icons and symbols may appear in the thumbnails pane:

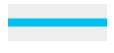
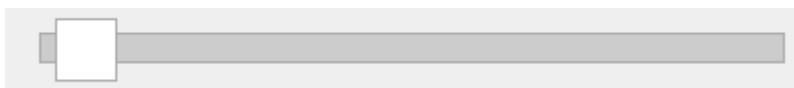
	Wand — as images are shown in the image display pane, this wand waves back and forth over each thumbnail indicating text on that image is being read, in preparation for indexing.
	Check — indicates text has been read on that image.
	Rotate left — rotates the image counter-clockwise.
	Rotate right — rotates the image clockwise.
	Delete — deletes the selected image.
	Split — when you have more than one image, any thumbnail that you select (except the first one in the document) will have an additional button over it, to split — create a new document that starts with the selected image.
	Document separation — a manual separation that creates a new document is shown as a horizontal bar.
	Merge — when the first thumbnail after a split is selected, it has a button to allow you to merge — combine the two separate documents into one.

Image display

Zoom and pan can be useful when indexing.

Zoom — the zoom bar at the bottom of the screen can be moved left and right to zoom in and out of an image. The mouse scroll wheel can also be used to zoom.



Pan — an image that is zoomed in so it is larger than the display area may be panned, to bring a different part of the image into display. Click on the image and drag it.

Indexing a Document

Indexing is entering information into index fields that were defined for that activity. Index fields are often used to capture important information about each document. Information may be entered into index fields at the time of image input and before the initial Submit, or when the document is retrieved from the [Indexing queue](#).

Document types

If more than one document type has been configured for your activity, a drop-down list will be displayed on the screen.

From the drop-down list, select the document type that applies to the document you are scanning or indexing.

Dental Claim

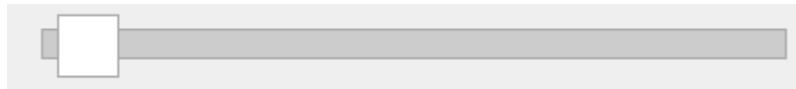
The index fields associated with the selected document type will be displayed in the right pane.

Entering index data

Rotate the image, if necessary for you to read information from it.

You may want to enlarge an image to make it more visible. Use the zoom bar or mouse scroll wheel to zoom, then click anywhere on the image and drag with the mouse, so you can see the data clearly.

Zoom bar:



Index data can be entered in these ways:

- Select an index field and then double-click in the image on the word that is required for the selected index field.
- Select an index field, hold down the Shift key, and use the mouse to click on the image at one corner of the desired information. Drag to the opposite corner to draw a rectangle around the information. The rectangle is highlighted, and text within it is entered into the selected index field. This method is especially convenient to enter multiple words into one index field.



Be sure that the index data has been read and entered correctly in the index field. Occasionally, it may be necessary to correct any errors.

- You can also enter the index data manually, using the keyboard.

Some index fields may be *required* — you will not be able to **Submit** the document for further processing until they contain a value. Required fields are indicated with a star:

Indexing after a manual document split

A document with more than one image allows you to insert manual splits between images - creating multiple documents. The recommended workflow when indexing in combination with manual split is:

- Create a manual split

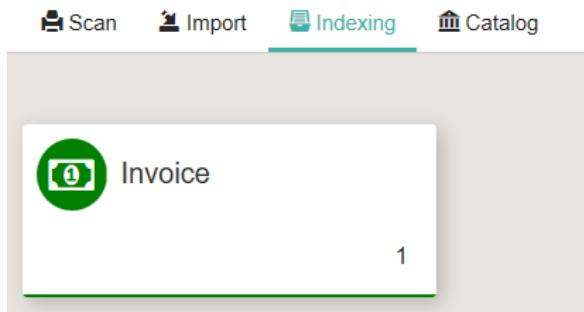
- Index the document that is selected (outlined, in the thumbnail pane)
- Submit that document
- Repeat as needed until all splitting is done; then index and submit the final document.

The indexing queue

If a separate indexing step has been defined for this activity, an indexing queue contains the documents available for indexing.

If your document will be indexed in a separate step, then you should scan images as usual, edit the document if needed, then choose the **Submit** button to send this document on for further processing and indexing.

From the Home screen you can see how many documents are ready for indexing, by choosing Indexing from the menu bar.



Any of your activities which have documents waiting for indexing are shown on this screen, with the number of waiting documents shown on the activity tile. Choose the desired activity tile to see the list of documents.

When you select an activity tile from the indexing queue, the next screen lists all the documents for the activity you selected, with the oldest first.

Number Of Pages	Created Date	User Name	actions
1	2016-07-05 1:39pm	Kathleen N Rhode	
1	2016-07-05 1:39pm	Kathleen N Rhode	
1	2016-07-05 1:40pm	Kathleen N Rhode	

Page 1 of 1 | 10 items per page | View 1 - 3 of 3

Advanced Search — displays a text entry box for any fields that you can use for searching or sorting. Use the “x” icon to clear text from this box and display all available documents again.

To select a document for indexing, click on it in the list. Selection of a document gives you the same document editing/index entry screen as shown in the [Capture screen](#). Edit index data as described above. **Submit** the document when information is complete.

Scanning, editing of images, and choosing a document type may not be available for an activity, depending on how it was set up.

You can remove a document from the indexing queue using the delete icon on its row in the list.

CAUTION: *the document will be gone from Info Input Express if you delete it.*

The status bar at the bottom of the list allows you to refresh the display, adjust how many items are displayed on one page, and page through a long list.

Page 1 of 1 | 10 items per page | View 1 - 3 of 3

Retrieving output from the Catalog

The Info Input Express catalog contains a record for each document that has been added to your IIX system. The catalog is a very convenient way to search for and access your output documents. Sometimes you may just need to see the index data for a document. You can use the catalog for that purpose, also.

The screenshot shows the 'Catalog' screen with the following interface elements:

- Menu Bar:** Scan, Import, Indexing, Catalog (highlighted in green).
- Sub-Menu:** Review submitted documents and data.
- Search Bar:** Select activity dropdown (set to <ALL>), Search input field, Advanced Search button.
- Table:** A list of 11 documents with the following data:

Link	Created Date	Filename	Date	Applicant Name
<input checked="" type="checkbox"/> PDF	2017-07-24 1:06pm	omauto cla	78899	-
<input type="checkbox"/> PDF	2017-07-24 6:27pm	u	11	-
<input type="checkbox"/> PDF	2017-08-08 1:43pm	BAS IT	01/012017	-
<input type="checkbox"/> PDF	2017-08-08 1:43pm	test	7-23-17	-
<input type="checkbox"/> PDF	2017-08-08 1:43pm	Nick c test	8-7-17	-
<input type="checkbox"/> PDF	2017-08-17 9:39am	JF Perfect Page test	8/17/2017	-
<input type="checkbox"/> PDF	2017-08-29 1:54pm	-	-	Dorothy Gold
<input type="checkbox"/> PDF	2017-09-12 11:51am	-	-	-
<input type="checkbox"/> PDF	2017-09-19 1:59pm	Stuff	Today	-
<input type="checkbox"/> TIF	2017-09-21 10:50am			
- Status Bar:** Page 1 of 2, View 1 - 10 of 11.

Click **Catalog** in the Menu bar to search the archive of documents. In the Catalog screen you are able to:

- **Select activity** — choose a specific activity, or all, for which to list the documents.
- Use **Advanced Search** to display text boxes over the columns of index fields. The text boxes may be used to search for a specific index value.

Links in the left column give you access to the document files.

- If a document has not been output yet, a link is provided for each image in it.
- A document that was output to more than one location will have a link for each location.
- Each link indicates an output file type: a TIF link will launch your TIF file viewer with the output file, a PDF link will launch Acrobat with the output file, etc.

The status bar at the bottom of the list provides you these options:



- Scroll to the right, to see index item values for all documents.

- Delete the selected document(s). Click in the checkboxes to select documents. Use the checkbox at the top of the column to select **all** the displayed documents. A confirmation dialog will appear.
- CAUTION:** *the document will be gone from Info Input Express if you delete it.*
- Refresh the display.
 - Adjust how many items are displayed on one page
 - Page through the catalog

Status Page

The status page is available by clicking on **Status** in the Title bar. On the status page you can see where any document in IIX is, in its processing: ready for output processing, waiting for indexing, complete (i.e. output), or in error status.

The screenshot shows the Info Input Express application window. The title bar has tabs for Home, Status (which is selected and highlighted in blue), Setup, and Alarms. An alert symbol is visible in the top right corner of the title bar. The main area displays a table of document status. The columns are Created (date and time), Definition name, and Status. There are four rows of data:

Created	Definition name	Status
2017-09-20 12:31pm	Auto Color Searchable PDF	Complete
2017-09-20 12:30pm	Color JPEG	Complete
2017-09-20 12:27pm	Color PDF	Complete

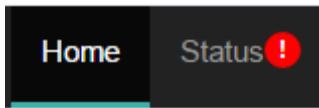
Below the table, there is a navigation bar with icons for back, forward, search, and other functions. To the right of the table, it says "View 1 - 4 of 4".

See also:

[Problem solving](#)

Problem Solving

An alert symbol in the title bar indicates that the Status page has a document with an error.



If the [Status page](#) shows a document with an Error status, you can take steps to recover from that situation. Not all problems that cause errors will be correctable by you, but some could be. For instance:

- Activity output is set up for a location (such as a folder on a file server) that doesn't have correct permissions for Info Input Express to write files to it. If you correct the permissions on the file server and then submit the document again, output should succeed.
- Activity output is set up for a location that won't allow Info Input Express to write files to it — for instance, because a typographical error in the activity setup assigned the destination on the X drive instead of the C drive. You should edit the activity setup to specify the correct destination, then submit the document again.

If a document on the Status page has an error, you will see Error! in the **Status** column and an Edit icon  at the end of that row.

Created	Definition name	Status	Status description
2016-07-13 9:40am	Kodak Waybill	Error!	
2016-07-12 9:47am	Kodak Waybill	Held	
2016-07-07 1:31pm	Kodak Waybill	Complete	

For an Activity Setup error

Return to Activity Setup to correct any errors in the setup (for instance, to change output to the C drive). Save the changed activity.

Then you can go back to the Status screen. Click on the Edit icon for the document that was affected by the bad activity setup. The Edit icon will take you to the Capture screen, where you can make document or index edits if needed, then submit.

For a document error

If the activity setup is correct and only the document data needs to change, then you can click on the Edit icon to edit and correct that document, then submit it again.

- Click on the **edit** icon to return to the Capture screen for that document.
- Look at the document for any situations that might have caused an error in processing. For instance, perhaps an index value is missing, or an index value collected from the image was read incorrectly.
- Correct any problems you see.
- Submit the document.

If you see, later, that the document has *Error!* status again, you may need to examine the Activity setup for possible problems with this document.

System Setup

Destinations

A destination is the account that Info Input Express will use with output to a Cloud service destination.

To create a destination select **Destinations** from the Setup menu bar. The Destinations list will be displayed. The Destinations list displays all destinations currently set up. If no destinations are set up, this list will be empty.

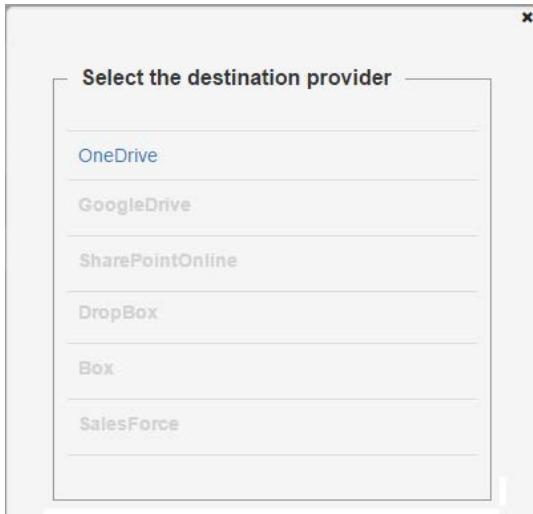
Destinations		
ID	Name	Provider
38	AGOogleDrive	GoogleDrive
15	alarisuser	OneDrive
7	AlarisUserTest	GoogleDrive
33	Auth10	SalesForce

Delete — allows you to delete a destination.

Search icon — displays a row of blank text-entry boxes, allowing you to filter what is displayed. For example, if you want to search for a specific destination (e.g., OneDrivePath) enter that name in the Name field.

Adding destinations

To add a destination, click **+Add destination** at the bottom of the screen. The **Select the destination provider** dialog box will be displayed.



Select the desired destination provider. The website associated with the selected provider will be displayed. Log in with the account name (email address) and password you want to use for output to this provider. If prompted, allow access. In Info Input Express, create a name and description for this destination. Any destination you create and name here will be available in [Activity Setup](#) as an output location.

NOTE: Successful output to Salesforce requires the activity to have an index item called Account, which contains a valid account name for your Salesforce destination. Output will fail without that index item, named Account, with the correct data in it. If you output to only one Salesforce account, setting a default value for Account may be a good choice. Refer to [Index Setup](#).

Status Bar



In addition to letting you **Add Destination**, the status bar at the bottom of the screen provides other options:

- The **Refresh** icon will update the Destinations screen with the most current information.
- Use the **Page** navigation arrows and drop-down to go to a specific page and display more destinations on this page.

Activity Setup

How to set up an Activity

Your Business Processes

Before you set up a new Info Input Express activity to support your needs, you need to consider your business processes (business activities).

- Identify the workflow that will be needed for each type of document to be processed by Info Input Express. Will any of the documents have bar code on them? Will you need a separate step for entry of index data?
- Choose one type of document to start with – that will be your activity.
- Identify the important information to save for the document.
- Identify where to store the output documents created by IIX.
- Now you can begin setting up Info Input Express for this activity.

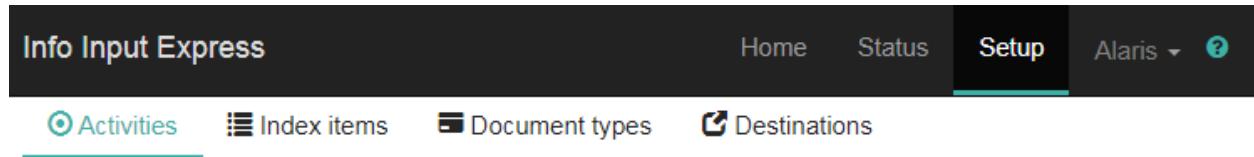
An activity should be set up in this order:

NOTE: Screen options that appear grayed out are not licensed or not applicable

1. **Destinations:** If you want to output to a Cloud destination, first set up the destination. If you only want to output to a File System, that can be set up on the Activities screen.
 - ◆ [Destinations](#)
2. **Index items and Document types:** To store important information about each document, set up index items and document types for the activity.
 - ◆ [Index Items](#)
 - ◆ [Document Types](#)
 - ◆ See also: [Accident Report Example](#)
3. **Activities:** Configure other settings for your activity. These settings include the activity name, input options, image processing, bar code reading, indexing, output file format, and output file naming and location.
 - ◆ [Activity Name](#)
 - ◆ [General](#)
 - ◆ [Input](#)
 - ◆ [Image Processing](#)
 - ◆ [Barcode](#)
 - ◆ [Indexing](#)
 - ◆ [Output File Format](#)
 - ◆ [Output Filename and Location](#)
4. Use the activity to be sure it gives the correct results. Adjust settings as needed.

[Retrieving output using the Catalog](#)

Setup on the title bar provides access to all the above functions. When **Setup** is selected, the Activities Setup screen will be displayed, and the other Setup menu options will be available. Refer to the links above for activity setup procedures.



Accident Report Example

As an example of an activity you might create in Info Input Express: let's say your business needs to store accident reports. You have two kinds of accident reports that you want to keep separate: equipment accident reports and chemical accident reports. The important information to store for each type of report is as follows:

Equipment accident report

- Equipment name
- Location

Chemical accident report

- Chemical name
- Location

This example will be referred to elsewhere.

Index Items

Index items allow you to add data to accompany the output files. The data can be used in the Info Input Express catalog to sort and filter output, enabling easier retrieval of output. It may also be useful to your internal systems for other business processing purposes.

Well chosen index items may enable more efficient work: needed information may be in the catalog display. Finding it there is quicker than opening output documents and searching for information.

You can also set up indexing items that determine where the output document files are stored, based on index values. For our [Accident Reports example](#), you may have the output reports go to: \AccidentReports\<Location>, where Location is an index value you fill in.

To add index items to an activity, select **Index items** from the menu bar on the Setup screen. The Index items screen will be displayed. This screen lists all of the indexes that are currently set up in the system.

Index items			
Name	Description	Type	Default value
<u>Receiver</u>	Company name	Text	
<u>Shipment number</u>	From barcode	Text	
<u>Term</u>		Text	
<u>Title</u>		Text	
<u>Total cost</u>		Decimal number	

Index items

- **Name** — name of the index item.
- **Description** — a comment that describes the index.
- **Type** — what kinds of values will be stored in this index item.
- **Default value** — the default value of the index.
- **Delete** — when selected, a confirmation box will be displayed.

When you click the **Search** icon, a row of blank text-entry boxes allows you to filter what is displayed. For example, if you want to search for a specific index item, enter its name in the **Name** field.

Adding index items

To add an index item:

Click on **Add index item**. The **Add Index Item** dialog box will be displayed.

Add index item

Name

Description

Type

Text

Default value

Cancel Save

1. Enter the name of the index in the **Name** field.
2. If desired, enter any notes or comments in the **Description** field.
3. Select the **Type** of data that will be saved in this index item:

- Text
- Whole Number
- Decimal Number
- Date/Time
- Checkbox
- DropDown

Only **text** type index items can be used for sorting the catalog display.

4. Enter a **Default value** if appropriate. For example, if you have an index item called Country, you may think that most of the time your own country will populate that field. In that case, specify your country's name as the default. If the country will vary often or you always want to explicitly choose a country, then leave the default field blank.

Click **Save**, or **Cancel** to exit the dialog without saving changes.

Status Bar



The status bar provides other options.

- The **Refresh** icon will update the screen with the most current information.
- Use the page navigation boxes to go to a specific page or display more items on this page.

Editing index items

If you want to edit an index item:

Click on the index item you want to edit. The **Edit Index Item** dialog box will be displayed.

The dialog box has the following fields:

- Name:** Document Name
- Description:** (empty input field)
- Type:** Text (dropdown menu)
- Default value:** (empty input field)

At the bottom are two buttons: **Cancel** and **Save**.

Make any desired changes.

Click **Save**, or **Cancel** to exit the dialog without saving changes.

Deleting index items

Index items can be deleted on the Index Items main screen.

Select the item to delete and click on the **Delete** icon at the right end of that row. A confirmation dialog will appear.

Document Types

A **document type** is a collection of fields that typically represents a kind of file that you will create with IIX. For example: accident reports, receipts, invoices, purchase orders.

To create or edit a document type that can be added to an activity, select **Document types** from the Setup menu bar. The Document types screen will be displayed. This screen lists all of the document types that are currently set up in IIX, and the following information about each one:

Document types			
<< Page 1 of 1 >> 25	View 1 - 3 of 3		
Name	Description	Index items	Activity definitions
Dates	Important date(s)	Creation Date	
<u>Document with Index</u>	This document requires a Document Name Index	Document Name	Auto Color Searchable PDF, Black and White PDF, Color PDF
<u>Document without Index</u>	This document does not have indexes		Black and White Multipage TIFF, Black and White RTF Word, Color JPEG
<< Page 1 of 1 >> 25	View 1 - 3 of 3		
+ Add document type			

- **Name** — the name of the document type.
- **Description** — a comment that describes the document type.
- **Index items** — the index items associated with this document type.
- **Activity definitions** — the activities this document type is used in.
- **Delete** icon — allows you to delete a document type. A confirmation box will be displayed.

When you click the **Search** icon, a row of blank text-entry boxes allows you to filter what is displayed. For example, if you want to search for a specific document type, enter its name in the **Name** field.

Status Bar

<< Page 1 of 10 >> 10	View 1 - 10 of 97
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At the bottom of the list, the status bar provides other options.

- The **Refresh** icon will update the screen with the most current information.
- Use the page navigation boxes to go to a specific page or display more items on this page.

Adding document types

To add a document type, click **Add document type**.

[+ Add document type](#)

The **New Document Type** dialog box will be displayed.

New Document Type

Name

Description

Index items

★ Bank Offices | Regional Offices ×

★ Designates required fields (select to toggle)

▼ Conditional index items

Additional index items depending on values of index items already added above.

+ Add condition

If index	Contains value
Bank Offices Regional Office -	Eastern Region
Include index	Initial value <input type="checkbox"/> Required
Eastern Offices -	New York

1. Enter the name of the new document type in the **Name** field.
2. If desired, enter any notes or comments in the **Description** field.
3. Click in the **Index items** box to display a drop-down list of the index items that are available to add to this document type.
4. Select one or two index items for this document type.
5. Index items can be marked as “required” for this document type. Click on the star to toggle between red and gray. A red star means the item is required — that index item must have a value before the document may be submitted.
6. If certain index items should be present only if another index item meets a specified condition, then expand the **Conditional index items** section of the dialog and click on **+ Add condition**. Conditional index items are relevant only for indexes that are type **drop-down list**.
7. For the **If index** field, select the field and choose an index. Depending on the index type, the conditions you can specify will change, and the indexes available for **Include index** will change. Specify values as needed for **Contains value** and **Initial value**. If the **Include index** must have a value when the condition is met, check the **Required** checkbox.
8. Click on the minus sign - to delete the condition.
9. Any number of conditions may be added. For the example above, additional conditions might be set up for Western Region, etc.

Click **Add** to save your changes or **Cancel** to leave without making changes.

Editing document types

If you want to edit a document type:

- Click on the document type you want to edit. The **Edit Document type** dialog box will be displayed.

The screenshot shows the 'Edit Document type' dialog box. It has three main input fields: 'Name' (containing 'Dates'), 'Description' (containing 'Important date(s)'), and 'Index items' (containing 'Creation Date'). Below these fields is a note: '★ Designates required fields (select to toggle)'. At the bottom, there is a section titled 'Conditional index items' with a disclosure triangle. Two buttons at the bottom right are 'Cancel' and 'Save'.

- Make any desired changes, as above when adding a new document type. Expand **Conditional index items** if needed.
- Click **Save**, or **Cancel** to leave without making changes.

Deleting document types

Document types can be deleted on the Document types main screen. Select the document type you want to delete and click on the **Delete** icon at the right end of that row. A confirmation dialog will appear.

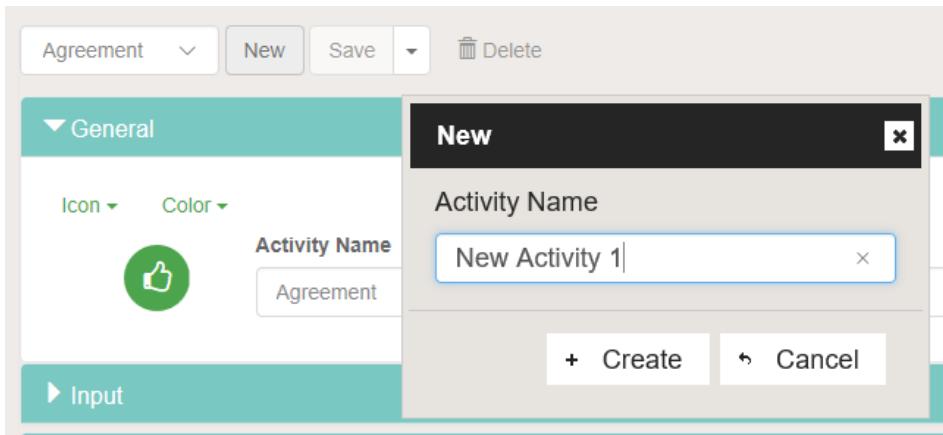
Activity Setup Screen

Activity Setup: General

The screenshot shows the 'Activity Setup: General' screen. At the top, there is a green header bar with a downward arrow and the text 'General'. Below this is a table with three columns: 'Icon', 'Activity Name', and 'Description'. The 'Icon' column contains a green circular icon with a white document symbol. The 'Activity Name' column contains the text 'Auto Color Searchable PDF'. The 'Description' column contains the text '200 dpi, color, two-sided, searchable PDF to MyDocuments\Info Input Express'.

Activity Name and Tile details

Click New in the Activity setup screen, to begin creating an activity. Enter a new activity name. The activity name will appear as a tile on the Home screen of Info Input Express.

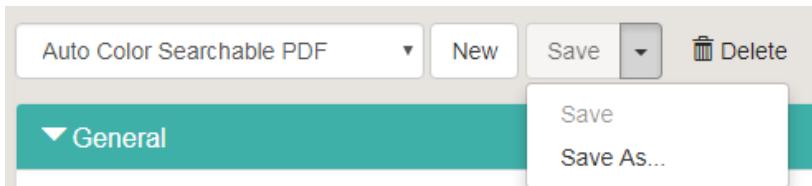


When creating or editing an activity setup, you can choose the icon that will be displayed on the activity tile and the color that highlights the icon and the tile. Make your selections from the drop-down choices by Icon and Color.

If you enter a Description, it will appear on the home screen when you hover over that activity tile.

Predefined Activities are included with Info Input Express. Before creating your own activities, you may want to review the settings of these activities. The predefined activities may meet your needs.

All defined Activities are displayed in the drop-down list.



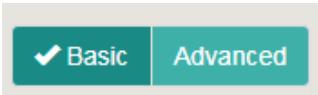
New creates an activity with default settings.

Use **Save** to keep any changes you made to settings for the displayed activity.

Use **Save As** to create a new activity based on settings from an existing activity.

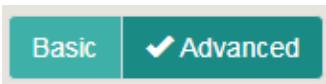
Delete removes the selected activity. A confirmation dialog will appear.

Basic and Advanced Activity Setup



Basic activity setup is selected by default. It enables definition and setup of:

- Allowed **Input**
- **File format** for output
- **Destination** information (location and file naming) of output files



Advanced setup enables all **Basic** settings plus:

- **Image Processing** options
- Various uses of **Barcode** in how your documents are processed
- A separate **Indexing** step, if indexing should happen as a specialized part of your process

All the selected features that are defined in setup of an activity - input, image processing, barcode processing, file format, etc. - are performed in the order shown on the Activity Setup page.

At the bottom of Activity Setup page

Save and Delete may also be done at the bottom of the Activity Setup page:



Activity Setup: Input

Document types

▼ Input

Document types [+ Add new](#)

Document with Index
 Document without Index

Document types are a collection of index items that typically represent a type of document (e.g., receipt, invoice, purchase order, etc.). The [Index Items](#) contained in a document type are defined using the [Document Type](#) function.

Select one or more document types that will be processed by this activity. If no index values need to be saved with the documents, you do not have to select any document type. In [our example](#), we have a document type: Equipment Accident Report and another document type: Chemical Accident Report. When creating an activity, Accident Report, you would select them both from the list.

IMPORTANT: *If you add or change the document types for this activity, Save the activity before editing the activity setup further. Otherwise the index items available for output file and folder naming may not be correct.*

Editing and Indexing

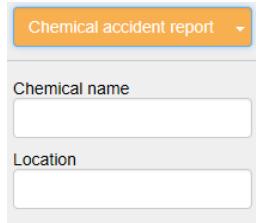
<input checked="" type="checkbox"/> Allow editing	One-click OCR Language	English ▾
<input checked="" type="checkbox"/> Allow indexing	<input type="checkbox"/> Show one-click OCR language Selector	
<input type="checkbox"/> Show document type selector		

Allow editing — check this option if you want to be able to edit and review any images prior to submitting the document (e.g., delete, reorder, rotate images).

Allow indexing — check this option if you want to be able to enter indexing information for the document. If this option is not checked, index data entry fields will not be displayed in the [Capture screen](#).

To set up an activity so no action is needed after scanning - in other words, submit, processing, and output happen automatically - leave both **Allow editing** and **Allow indexing** unchecked.

Show document type selector — determines whether document type can be selected in the [Capture screen](#). For [our example](#), Equipment Accident Report and Chemical Accident Report would be in the drop-down list, if this option is checked. The index items displayed on the Capture screen will change, depending on the document type selected.



User interface options for scanning

Scanner Settings

Scanner settings determine what should be imaged, what the images look like, and image file size.

For the Kodak scanner models below, use the associated profile:

Alaris Scanner: S2000	<input checked="" type="radio"/> Use custom profile ... Black and White Perfect Page Document	<input type="radio"/> Use General settings below	<input type="radio"/> Show TWAIN dialog before scanning
Alaris Scanner: S2000w	<input checked="" type="radio"/> Use custom profile ... Black and White Perfect Page Document	<input type="radio"/> Use General settings below	<input type="radio"/> Show TWAIN dialog before scanning
Use general settings			
300 dpi <input type="button" value="▼"/> Black & white (1-bit) <input type="button" value="▼"/> Two sided <input type="button" value="▼"/>			

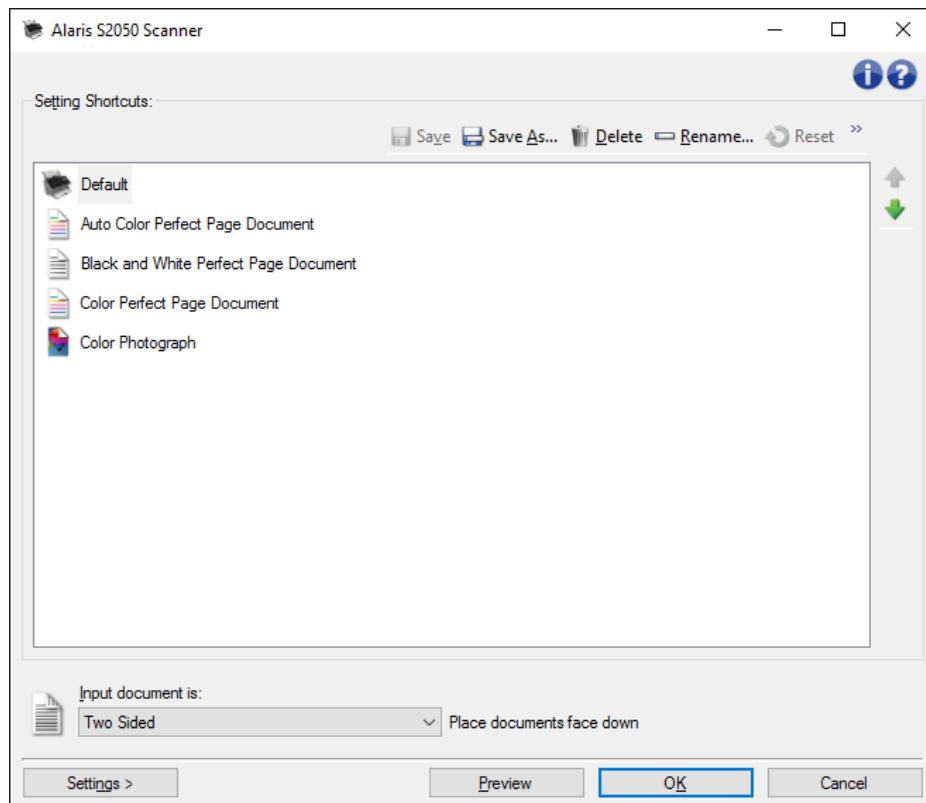
For KODAK and Alaris scanners, you have three choices

A list of scanner drivers installed on your PC will be displayed. Choose the settings to be used for each scanner model that you might be using.

- **Use custom profile:** if the right profile is already selected, choose this radio button. If no profile is selected, choosing the radio button will open the scanner TWAIN dialog. If you want a different profile, select **Use custom profile** button to open the TWAIN dialog. If you have a different scanner model than the one(s) you set up, **Use general settings** will apply.
- **Use General settings below:**
 - ◆ dpi (resolution): allows you to select the dots per inch (dpi), which is a determinant of image quality. A higher resolution setting will increase scanning time and image size and may slow system performance. Usually 300 dpi is sufficient for optical character recognition, and 200 may be adequate.

NOTE: dpi settings for color are generally recommended to be set at less than 300 dpi, to save scanning time and disk space.
 - ◆ Image color:
 - **Color (24-bit)** — produces a color version of your document. Color images produce much larger file sizes.
 - **Grayscale (8-bit)** — produces a version of your document in shades of gray.
 - **Black and White (1-bit)** — produces a black and white version of your document. Black and white images will produce the smallest file size.
 - ◆ Sides to scan: both, front only, or back only.
- **Show TWAIN dialog before scanning:** launches the TWAIN user interface before scanning will begin. When the TWAIN user interface is displayed, you can configure the desired setting shortcut for the connected scanner. [This option provides more flexibility but is much more time-consuming, because the TWAIN dialog is displayed every time this activity is used. At the TWAIN dialog:](#)

Choose a scanner setting shortcut to use as the profile for this activity, or create/modify one by clicking on **Settings**. For details on configuring the scanner, refer to scanner documentation.



Activity Setup: Output File Format

File format options

File format settings are applied to the output document.

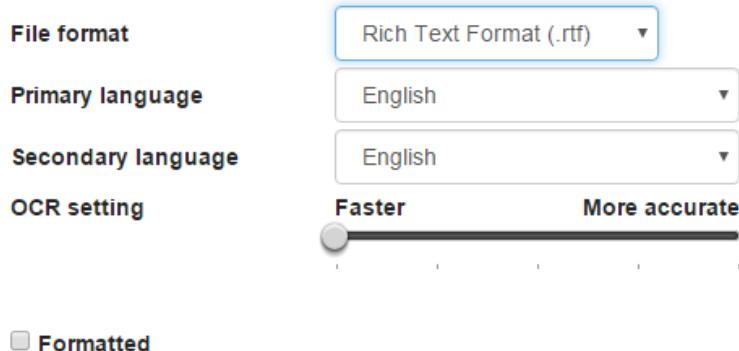
The screenshot shows a configuration panel titled "File format". It has a "Enable" radio button selected. Under "File format", there is a dropdown menu set to "PDF (.pdf)". Under "PDF format", there is a checkbox labeled "PDF/A" which is unchecked. Under "Image quality", there is a dropdown menu set to "Draft".

Enable/Disable — select **Enable** if you want to set file format options for this activity.

File format — select a file format based on how you want your output documents to be formatted.

- **PDF format**: produces a .pdf file.
- **PDF/A** — saves additional formatting information in the document (such as fonts).
- **Image quality**: select one of the following options: **Draft**, **Good**, **Better**, **Best**, **Superior** or **Retain Original**.

- **File format:** **Rich Text Format** or **Text**: performs OCR (Optical Character Recognition) on the image and saves the document as Rich Text Format or Text.



- **Primary language** — selecting the appropriate primary language ensures that Info Input Express 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** — a secondary language may be selected when a document may contain characters from more than one language.
Your selection in the *Primary language* field will limit the language selections in the *Secondary language* field.
- **OCR setting** - OCR results depend on the scan quality of your images. If your images are scanned from clean documents, the OCR engine will yield more accurate results than if the source documents are of poorer quality. **Faster** increases the processing speed of OCR but the results may be less accurate; whereas **More accurate** will be a slower processing speed with more accurate results.
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. OCR requires documents in the upright position, therefore ensure that your Alaris scanner settings, as specified in Activity Setup - Input, have Auto-Orientation enabled.
- **Formatted** — produces formatted text or formatted RTF.
Selecting a file format of **Rich Text Format**, **Excel**, **Text** or **CSV** will result in the document containing only the data that was OCR'ed. Any images that are not OCR'ed (because the image contains data that cannot be OCR'ed) will not be included in the resulting document.
- **File format: Searchable PDF**: creates a PDF document that allows for text searches.

File format	Searchable PDF (.pdf)
Primary language	English
Secondary language	English
OCR setting	Faster More accurate

PDF format PDF/A

- **Primary language** — selecting the appropriate primary language ensures that Info Input Express 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** — a secondary language may be selected when a document may contain characters from more than one language.

Your selection in the *Primary language* field will limit the language selections in the *Secondary language* field.

- **OCR setting** — OCR results depend on the scan quality of your images. If your images are scanned from clean documents, the OCR engine will yield more accurate results than if the source documents are of poorer quality. **Faster** increases the processing speed of OCR but the results may be less accurate; whereas **More accurate** will be a slower processing speed with more accurate results.

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. OCR requires documents in the upright position, therefore ensure that your Alaris scanner settings, as specified in Activity Setup - Input, have Auto-Orientation enabled.

- **PDF format** — select **PDF/A** to save additional formatting information in the document (such as fonts).
- **File format: TIFF:** creates one file that contains all of the images.

File format	TIFF (.tif)
B&W compression	Group4
Grayscale/color compression	None
Color quality	Better

- **B&W compression** — selecting **Group4** will compress black and white TIFF images and reduces file size.

- ◆ **Grayscale/color compression** — selecting **JPEG** will compress grayscale or color images and reduces file size.
- ◆ **Color quality** — select one of the following options: **Draft, Good, Better, Best, Superior** or **Retain Original**.
- **File format: Word**: creates a Microsoft Word document. OCR settings are available.
- **File format: Excel**: creates an Excel spreadsheet. OCR settings are available.
- **File format: CSV**: creates a comma-separated file. OCR settings are available.
- **File format: Jpeg, Png, and Bmp** produce image file output in the specified format.

Activity Setup: Output Filename and Location

Destination options

The Destination screen allows you to create output profiles and specify locations for your output documents. Output profiles are a collection of settings that describe your output destination. Up to 5 output profiles can be defined for each activity. These settings are applied to the output documents.

The screenshot shows the 'Destination' configuration screen. At the top, there's a header bar with a downward arrow and the word 'Destination'. Below it, a section titled 'Destination Profiles' contains a list with 'C:\Express Documents' and a delete icon. To the right of the list is a '+' button. The main area has three sections: 'Profile name' (set to 'C:\Express Documents'), 'Output type' (set to 'File system'), and 'Index data' (checkbox checked). Under 'Destination folder', there's a dropdown menu showing 'C:\Express Documents\Auto Color Searchable PDF'. Under 'Filename formula', there's a text input field containing 'Document Name'. On the far right, there's a large panel with two main sections: 'Double-click or drag any of the available items to build a folder, document set, or file path formula.' and 'Index items'. The 'Index items' section contains a single item: 'Document Name'.

Destination Profiles — defines the name and settings for the profile. Click the **Add** icon to create a profile then click on the profile name for fields to customize your output destination.

- **Profile name** — enter the desired profile name.
- **Output type** — you can copy documents to your cloud **Destinations**, a **SharePoint library**, a **File system** location, **Command Line Output**, or **WebDAV**; or you can send the output document using email.

Depending on the output type you select, the other options on this screen will change.

- **Include index data in output** — check this if you want a file with the index values to go to the same output destination with the document.
- **Destination folder** — to build the destination folder name, double-click or drag desired items for this activity from the *Date/time* or *Index items* boxes into the *Destination folder* box.
 - ◆ You can enter other information in the *Destination folder* box. For example, if you wanted an underscore to be placed between the *Day* and *Time* values, place your cursor between the *Day* and *Time* fields and enter an underscore character.
 - ◆ If you add an entry to the formula box that you do not want, place the cursor after the entry and press the **Backspace** key on the keyboard.

Only index items that are common to all the document types in this activity will be available for Folder or File naming.

You must **save** the activity definition to see the available index items.
- **Filename formula** — select and drag any of the names from the *Date/time* or *Index items* boxes that you want to be included in the filename.
 - ◆ You can enter other information in the *Filename formula* box, as for the *Destination folder* box.
 - ◆ If you add an entry to the formula box that you do not want, place the cursor after the entry and press the **Backspace** key on the keyboard.
- **Filename Sequence Numbers** — if a duplicate filename is discovered during output, a sequence number will be appended to the filename according to the starting sequence number set up here.

Cloud Destination output

If you select **Destinations** as your **Output type**, a field **Destination name** will appear. **Destination name** has a drop-down box listing any output locations you set up using the **Destinations** menu item - such as a Google Drive or DropBox account. See [Destinations](#).

If you select output to Salesforce, do *not* use nested folders to organize your output. All folders will be created at the top level of the account.

SharePoint library output

Choose **SharePoint library** to output to an on-premise SharePoint location:

▼ Destination

Destination Profiles

Alaris SharePoint Delete +

Profile name Alaris SharePoint Output type SharePoint library Site URL <input checked="" type="radio"/> http:// <input type="radio"/> https:// qa-sp2013.cloudapp.net/site Library name Trust Agreements Destination folder Filename formula	Double-click or drag any of the available items to build a folder, document set, or file path formula. Date/time Day (DD) Month (MM) Year (YY) (DDMMYY) (MMDDYY) Year (YYYY) Julian (YDDD) Time (12hr) Time (24hr) AM/PM am/pm User Name Unique Identifier Index items Company Name Agreement Type
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- **Site URL** — depending on the web server you are communicating with, select **http://** or **https://**; then enter the address of the web server and SharePoint site URL where the documents are to be copied.
 - ◆ Be sure the site URL is specified correctly, as there is no validation performed on the site URL.
 - ◆ The Output Service must be configured with proper access permissions to the specified SharePoint site URL.
- **Library name** — enter the library name where you want the documents stored.
 - ◆ The *Library name* is case-sensitive.
 - ◆ Index values will be copied to the output SharePoint library if matching columns are found. For matching columns, the data requirements of the output library column (e.g., minimum length, maximum values, etc.) must be met by the index values of the document being output.
 - ◆ If the output SharePoint library has *required* columns, then the IIX activity index item names must match those SharePoint column names and contain the right type of data. Otherwise an error will occur when copying to the output library.
- **Destination folder** — to build the destination folder name, double-click or drag desired items for this activity from the *Date/time* or *Index items* boxes into the *Destination folder* box.
 - ◆ For a SharePoint on-line destination, the *Destination folder* may designate a subfolder/subsite.
 - ◆ The name "Forms" cannot be used; it is a reserved folder name.

File system output

Choose **File system** to output to your computer or a location on a file share:

Destination

Destination Profiles

C:\Express Documents

Profile name C:\Express Documents Output type File system <input checked="" type="checkbox"/> Include index data in output Destination folder C:\Express Documents\Auto Color Searchable PDF Filename formula Document Name Filename Sequence Numbers	Double-click or drag any of the available items to build a folder, document set, or file path formula. Date/time Day (DD) Month (MM) Year (YY) (DDMMYY) (MMDDYY) Year (YYYY) Julian (YYDDD) Time (12hr) Time (24hr) AM/PM am/pm User Name Unique Identifier Index items Document Name
--	---

- **Destination folder** — to build the folder name, drag the desired items from the *Date/time* or *Index items* boxes into the *Destination folder* box.
 - ◆ A destination folder may be specified by UNC path or a mapped drive.
 - ◆ Be sure the UNC path is specified correctly; there is no validation performed on the UNC path.

Command Line output

Choose **Command Line** to launch an application and open your output in it. For instance you might want PDF output files to automatically launch Acrobat Reader with the file open for viewing.

Destination

Destination Profiles

My Documents Folder
Launch Acrobat

Profile name Launch Acrobat Output type Command Line Output Program Name C:\Program Files (x86)\Adobe\Read Parameter Formula File System	Double-click or drag any of the available items to build a parameter formula. Available Parameters File System
---	---

Two Destination Profiles must be set up, for an activity that will use Command Line Output:

- Output to File System
- Output to Command Line Output

In the Command Line Output setup:

- ◆ **Program Name** — the path to the application that should be launched, e.g. Reader 10.0\Reader\AcroRD32.exe
- ◆ **Parameter Formula** — the **File System** parameter value will be the full path to the output document.

Email output

You can set up an activity so it will use your email client to send an output document (and optionally its index data) to a recipient.

▼ Destination

Destination Profiles

C:\Email output Delete +

Profile name	C:\Email output	Double-click or drag any of the available items to build a folder, document set, or file path formula.
Output type	Send as email attachment	Date/time
Index data	<input checked="" type="checkbox"/> Include index data in output	Day (DD) Month (MM) Year (YY) (DDMMYY) (MMDDYY) Year (YYYY) Julian (YYDDD) Time (12hr) Time (24hr) AM/PM am/pm User Name Unique Identifier
Email to	Document Unique Identifier from	
Subject	User Name for Attention:	
Message	The attachment, Document Name, requires your attention to be processed.	Index items Document Name Attention:

When you choose **Output Type Send as email attachment**, the remaining fields in the *Destination* tab become relevant for email:

- **Email to:** enter an email address if all output from this activity should go to the same address. If you leave the field blank, then you will be prompted to enter a recipient for each document that is output using this activity. Any other desired edits can be made in the email before you send it.
- **Subject:** can contain text with any of the date/time items, system provided items, and index items on the screen.
- **Message:** can contain text with any of the date/time items, system provided items, and index items on the screen.

WebDAV output

Choose **WebDAV** to output to a server or web server:

▼ Destination

Destination Profiles

C:\Express Documents

Profile name	C:\Express Documents	Double-click or drag any of the available items to build a folder, document set, or file path formula.
Output type	WebDAV	Date/time
WebDAV URL		Day (DD) Month (MM) Year (YY) (DDMMYY) (MMDDYY) Year (YYYY) Julian (YYDDD) Time (12hr) Time (24hr) AM/PM am/pm User Name Unique Identifier
Folder Path		
Domain Name		Index items
Username		Document Name
Password		
Filename formula	Document Name	
Filename Sequence Numbers		

- **WebDAV URL** — the **server name** (or IP Address) and **Port Number** where the web service is running.
- **Folder Path** — the **folder on the web server** where the documents will be output.
- **Domain Name** — where the server resides - this information is **required**.
- **Username** and **Password** — credentials to access the web service.

Activity Setup: Image Processing

Image Processing options

Enhancements to the image

▼ Image Processing

Enable Disable

Rotate based on text
 Fill in holes
 Detect and straighten (crop and deskew)
 Convert color/gray images to b&w

Contrast 0

Remove Speckles
Lone pixel

These settings are applied *after* you **submit** the document for processing. Changes will not be visible until the output document is opened.

Note: If you need to see image processing changes while in the image capture screen, set up the image processing options in the TWAIN user interface as custom scanner-specific profiles. All the options in the Image Processing section of Info Input Express are available using TWAIN, for all Kodak and Alaris scanners. Setting up through TWAIN is the safest way to ensure that images are rotated correctly, blank pages have been deleted, and document splits were applied correctly.

Enable/Disable — select Enable if you want to set image processing options for this activity.

Rotate based on text — analyzes the content of your documents and adjusts each image so it is correctly oriented. This option must be set, if output will include content that will be OCR'd, such as searchable PDF, text, Word, and Excel.

Fill in holes — fills in the holes that are around the edges of your document. The types of holes that are filled include: round, rectangular, and irregularly shaped (e.g. double-punched or those having a slight tear that could have occurred when the document was removed from a binder).

This option is most effective on documents scanned as black and white at 300 dpi (or higher) resolution.

Detect and straighten (crop and deskew) — for scanners that do not provide crop and deskew, this option can be used to automatically find each page and will straighten the image of a page that may have been fed crooked.

If images are cropped and deskewed by the scanner it is recommended that you do *not* check this option. Because results may vary, it is also recommended that you review the results of sample documents.

Convert color/gray images to b&w — check this option if you want to convert a color or grayscale image to a black and white image.

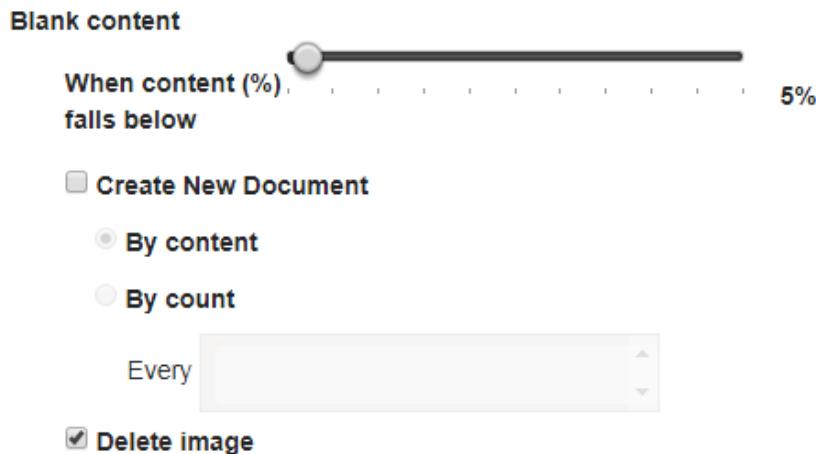
- **Contrast:** allows you to make an image sharper or softer. Decreasing this setting will make the image softer and reduce speckles in the image. Increasing this setting will make the image clearer and make light information more visible. The options range from -50 to 50. The default is 0.

Remove Speckles — occasionally small dots or specks appear in the background of a scanned image, because of variations in paper thickness. These specks usually contain no image information. Using this option on documents containing very fine detail (e.g., the dot on an "i" in 4-point type) may cause information to be lost. It is recommended that you do not use Remove Speckles when scanning documents with text smaller than 7-point type.

This option only applies to documents scanned as black and white at a minimum resolution 200 dpi. However, Remove Speckles is most effective when scanning at 300 dpi (or higher) resolution.

- **Lone Pixel:** reduces random noise by converting a single black pixel to white when it is completely surrounded by white pixels or by converting a single white pixel to black when it is completely surrounded by black pixels.
- **Majority Rule:** sets each pixel based on its surrounding pixels. The pixel will become white if the majority of the surrounding pixels are white or black if the pixels are black.

Blank images



- **When content (%) falls below:** the percentage of the image content on an image that will be used to determine if an image is blank. For example, if you are scanning medical forms and the only information on every other image is a 2-line disclaimer notification that you do not need to keep, select the approximate percentage of the image that includes this information (e.g. 4%). Therefore, when an image is scanned that has less than 4% information on the image, the image will be interpreted as a blank. If you have Delete image checked, blank images will be deleted automatically after the document is submitted for processing.
 - **Create New Document** — with this option, image processing will create a new document whenever a blank page is detected or a specified number of images has been counted. When you select Create New Document, the By content and By count options are available.
 - **By content:** when a blank page is detected a new document will be created beginning with the blank page.
 - **By count.** Every: when you enter a number in this field, a new document will begin every time this number is reached. For example, if you are scanning multiple invoices at a time and every invoice has 4 images, select 4 in this field and the original stack of input pages will be separated into multiple 4-image documents.
 - **Delete image:** deletes any image that has less information on it than the percentage value selected in the **When content (%) falls below** option.

Activity Setup: Barcode

Bar code options

If your documents include barcode, you can use the barcode to put values into index items, or to cause an automatic document separation — or both. *Hover your mouse pointer over a question mark for help with barcode setup options.*

Index mapping

Type for barcode mapping (first page only) ?

Data from these barcode types will be used for index mapping

Barcode reading is done by the scanner, if possible. Barcode *processing* happens after the document is **Submitted**. If Indexing is enabled (see [Activity Setup - Indexing](#)), then you will see the results of the barcode reading after retrieving the document from the Indexing queue: barcode values in index fields, and/or document separation based on barcode - whatever you set up in the activity definition. If Indexing is not enabled, then the results of barcode reading will not be visible until the output document is viewed.

Available barcode types are:

- Codabar
- Code 128
- Code 3 of 9
- Code 93
- Data Matrix
- EAN 13
- EAN 8
- Interleaved 2 of 5
- PDF417
- QR Code
- UCC Code128
- UPC-A
- UPC-E

Putting a barcode value in an index item

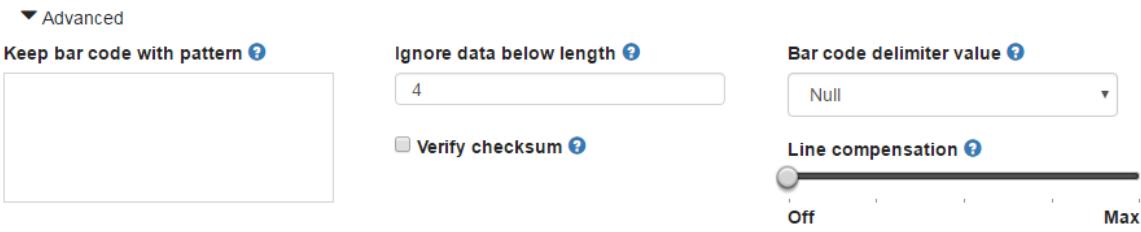
To put barcode values into index items:

Select **Enable** to perform barcode reading.

1. For index mapping, choose the **Type(s)** of barcode that will have the values to be put into index items. Click in the Type field to get a drop-down list of possible barcode types. You can select more than one type. Only barcodes on the first image of each document will be read for index values.
2. Next, map the Index items in this activity to the barcodes. The index items common to all document types in this activity are listed, with "N/A" in the **Barcode** column. For each index item that will be populated by barcode, click at the "N/A" to get a drop-down list of barcode numbers: BC1, BC2, etc. These numbers refer to the first, second, etc. barcode detected on the image. Barcodes are read from left to right and top to bottom of the image. In the example below, a value for the index item "Company name" will appear in the first barcode on the page: BC1. A value for "Agreement type" will be in the second barcode on the page: BC2.

Index	Barcode
Company Name	BC1
Agreement Type	BC2

3. **Advanced** barcode setup allows you to have more control over which barcodes will be read for index values. Any options chosen in Advanced will be applied to all the barcodes read for index mapping



4. **Keep barcode with pattern** allows you to define the expected format of the barcode value. Only scanned barcodes that meet the pattern will be used for indexing purposes. Allowed patterns are shown, if you click in the box.

Keep bar code with pattern

Regular

My Text Here A X 9 ?(5) A(5) X(5)

9(5)

Date

DD-MM-YYYY DDM YYYY MMDDYYYY

YYYYMMDD JJJ YYJJJ DD DDD MM

MMM YY YYYY

Time

HHmmss hhmmss HH hh mm ss tt

For example, a pattern "A(8)" will use a barcode value of up to, but not exceeding, eight alphabetic characters. Use the "9" pattern for numbers and the "X" pattern for either letters or numbers. The "?" pattern means any character, including symbols such as * or \$.

5. **Ignore data below length** lets you specify the minimum number of characters that must be present in the barcode, before a valid barcode is detected. If this number is too small, then non-barcode information may be interpreted incorrectly as a barcode. Best results are obtained with a length of at least 4.
6. **Verify checksum** if you know that your barcodes are created with a checksum. (A checksum helps to assure data integrity.)
7. **Barcode delimiter value** should be specified if your barcode has more than one value in it. For instance, a PDF417 barcode may have multiple values, separated by one of the characters shown in the drop-down list. You may enter a different character.
8. **Line compensation** helps reading reliability, if barcodes are missing pixels.

Automatic document separation on barcode

The screenshot shows a configuration panel for 'Separation'. At the top is a bolded title 'Separation'. Below it is a checked checkbox labeled 'Separate on bar code'. Underneath this is a dropdown menu with the option 'Any' selected. At the bottom is an unchecked checkbox labeled 'Delete bar code separator image'.

You can set up the activity to separate documents automatically, when a barcode is read. To set up automatic separation based on barcode:

1. **Enable** barcode reading.
2. Click in the checkbox to **Separate on barcode**. Then click in the box to select which barcode type to use for separation: **Any** barcode that's found, or one specific type (select from the drop-down list).
3. *Separation may be more reliable if you select a specific type.* Some barcode types are prone to false positives when using **Any**. If you need to separate based on Codabar, select Codabar explicitly and do not use **Any**.
4. The image with the separation barcode will be the first image of the document, unless you choose **Delete barcode separator image**. If you delete the image with the barcode, then the next image will be the first in the document.

A barcode may be used for both index mapping and document separation, even if you delete the barcode separation image.

Activity Setup: Indexing

Indexing options

The screenshot shows the 'Indexing' tab settings. At the top is a green header bar with a downward arrow icon and the word 'Indexing'. Below this is a radio button labeled 'Enable' which is selected, and another radio button labeled 'Disable'. A horizontal line separates this from a list of three checkboxes: 'Allow editing', 'Show document type selector', and 'Show one-click OCR language Selector', all of which are currently unchecked.

The Indexing tab lets you set up a workflow that:

- Enables confirmation of processing before the document goes to file formatting and output.

The Indexing tab in Activity setup lets you choose whether to:

- **Allow editing:** you can add or delete images, rotate images, re-order images.
- **Show document type selector:** you can choose a different document type for the document (if the activity has multiple document types associated).
- **Show one-click OCR language selector:** you can choose which language dictionary to use, for interpreting double-click index data entry.

To confirm processing:

Documents are processed in the order of the tabs in Activity setup: input, image processing, bar code reading, indexing, file formatting, and output to a destination.

- If you want to verify, for example, that image processing was correct or that bar code values were correctly entered into index fields, then you can enable Indexing for the activity.
- After creating a document you will submit the document, then initial processing will take place, and then the document will be put into an indexing queue.
- From the indexing queue it must be opened and reviewed and submitted again, before it goes to file formatting and output.

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