© 2014 Agilysys. All rights reserved.

This information and any software or software language described in it is furnished under license or nondisclosure agreement and may be used or copied only in accordance with the terms of such license. The following content is furnished for information use only, is subject to change without notice, and should not be considered as a commitment by Agilysys. Agilysys assumes no responsibility or liability for any errors or inaccuracies contained within this content. Any dates or version numbers attached are for the sole purpose of correlating information via customer support processes and are not to be construed as indicating that the information is complete or in any way updated to correspond with product builds of a similar date.

This information and any copyrighted software accompanying this content are licensed for use only in strict accordance with a license agreement or Agilysys license terms applicable for such software. They may be used only by the Customer and the Customer shall not permit this information or software to be used by or for the benefit of any other party, nor use the guide and software at any time after the term of the Customer’s license to use this information and software expires. Any Agilysys product or third-party product provided by Agilysys and related product information and software, shall at all times remain the sole and exclusive property of Agilysys or its licensor, and Customer shall obtain no title to the same. Absent a separate written undertaking executed by an authorized Agilysys representative, Agilysys disclaims any express or implied warranties, including but not limited to any warranties of merchantability or fitness for any particular purpose, or any warranties arising from a course of dealing, usage, or trade practice. In no event shall Agilysys be liable for any lost revenues or profits, or other special, indirect and consequential damages, even if Agilysys has been advised of the possibility of such damage.

Customer may not publicize its relationship with Agilysys or use of Agilysys products without the express written consent of Agilysys. All logos, trademarks, and product names mentioned herein are published with permission of their respective owners with all rights remaining with such original owners as appropriate under international and United States law.

Except as permitted by license, no part of this information may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Agilysys.

<table>
<thead>
<tr>
<th>Date</th>
<th>ID Lead</th>
<th>SME</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 November 2011</td>
<td>Colin Steuterman</td>
<td>Lynn Yuan</td>
<td>Added information on duplex scanning feature.</td>
</tr>
<tr>
<td>25 January 2012</td>
<td>Colin Steuterman</td>
<td>Lynn Yuan</td>
<td>Updated document to 8.2 version.</td>
</tr>
<tr>
<td>24 April 2012</td>
<td>Colin Steuterman</td>
<td>Lynn Yuan, Syed Khaled</td>
<td>Updated document for more 8.2.x changes, specifically the text search.</td>
</tr>
<tr>
<td>26 September 2012</td>
<td>Colin Steuterman</td>
<td>Lynn Yuan</td>
<td>Added section for Create DocFlow Job feature.</td>
</tr>
<tr>
<td>2 December 2, 2013</td>
<td>Colin Steuterman</td>
<td>Lynn Yuan</td>
<td>Updated documentation for options section features.</td>
</tr>
<tr>
<td>2 June, 2014</td>
<td>Syed Khaled</td>
<td>Lynn Yuan</td>
<td>Added DocFlow section and updated to 8.3.</td>
</tr>
</tbody>
</table>
# Table of Contents

Table of Contents.............................................................................................................. 3

About this Document........................................................................................................ 5
  Document Purpose........................................................................................................ 5
  Target Audience ......................................................................................................... 5
  How to Read this Report ............................................................................................ 5
  Before You Begin ....................................................................................................... 5

Chapter 1: Introduction ................................................................................................. 6
  Customizing Windows ............................................................................................... 6
  Log-On Window ......................................................................................................... 8
  Main Menu Window .................................................................................................... 9

Chapter 2: Create Batch ............................................................................................... 12
  Quick Reference - Create Batch ............................................................................... 13
    Create Batch with Scanned Documents .............................................................. 13
    Create Batch with Imported Documents ............................................................ 13
  Create Batch with Scanned Documents .................................................................. 14
  Create Batch with Imported Documents ............................................................... 18

Chapter 3: View & Manage Batches .............................................................................. 20
  Manage Batch ........................................................................................................... 21
  Update Documents in a Batch .................................................................................. 22
    Insert .................................................................................................................... 22
    Move .................................................................................................................... 23
    Delete ................................................................................................................... 24
    Replace ................................................................................................................ 24
  Print Document ........................................................................................................ 25
  E-mail Document ....................................................................................................... 25
  Annotations ................................................................................................................. 26
    Add/Edit Annotation ............................................................................................ 26
    Modify Annotations .............................................................................................. 28
    Save Annotation ................................................................................................... 29
    Hide Selected Annotation / Hide All Annotations / Show Annotation ................. 29
    Customize Rubber Stamp .................................................................................... 30
    Output with Annotations ....................................................................................... 31
    Rotate/Rotate Save .............................................................................................. 32
    Zoom In/Zoom Out/To Width ............................................................................... 32

Chapter 4: Batch Index ................................................................................................... 33
  Quick Reference - Index Batches .............................................................................. 33
  Index Batch ............................................................................................................... 34

Chapter 5: Single Scan Index ........................................................................................ 36
  Quick Reference - Single Scan Index ...................................................................... 36
  Import/Scan and Index ............................................................................................. 37
Chapter 6: Search Indexed Documents ................................................................. 38
Quick Reference - Document Search ................................................................. 39
  Basic Search .................................................................................................. 39
  Text Export Search Results ........................................................................... 39
Basic Search Methods ...................................................................................... 40
  Basic Search ................................................................................................ 40
  Wildcard Search .......................................................................................... 42
  Text Searches ............................................................................................... 43
Advanced Search Methods .............................................................................. 44
  Condition ..................................................................................................... 45
  And/Or ......................................................................................................... 46
  Date Processed/Indexer ............................................................................... 47
Export Search Results ...................................................................................... 48
Chapter 7: Create DocFlow Job ........................................................................ 50
About this Document

Document Purpose

The purpose of this document is to inform the user of the features within 8.2 versions of DataMagine Web Scan and Index.

Target Audience

This document is for the clients of Agilysys who use DataMagine.

How to Read this Report

This document is for reference purposes only. Specific values, especially in screenshots, should be read as examples only.

A check box (☐) precedes each action item (instruction).

This document utilizes several fonts for various purposes:

- **Times New Roman** font is for explanatory text.
- **Arial** font is for literals – character strings that are used in commands, in replication of screen shot information, etc.
- **Courier New** font is for code, and for data displays that require that all characters be of equal width.

Before You Begin

- Contact your Agilysys representative to obtain the correct software CD.
Chapter 1: Introduction

DataMagine™ Web provides users with the ability to perform scan/import, index and search functions via a Web browser, instead of using the traditional desktop Imaging Client.

This manual discusses how to use the Web Imaging product.

Customizing Windows

Imaging requires a minimum resolution of 1024x768 pixels. This section discusses how to modify the resolution on a PC.

☐ Right click an empty area on the PC’s desktop.

A menu displays:

![Screen Resolution Menu](image)

☐ Click Screen resolution.

The Screen Resolution window displays.
Click on the Resolution drop down menu and make sure the screen resolution is set to greater than 1024 x 768 pixels.

Click OK when complete.
Log-On Window

- Open Internet Explorer 8 or higher and type the following address:

  http://servername/websitename/dmlogin.aspx

The DataMagine Logon window displays:

- Type your user assigned DataMagine Imaging user ID and password, then click Submit.

  **Note:** If you know you are to be the only user accessing this browser from your operating system, you may click Remember Me to have the system remember your user ID. This option is not recommended for multiple users on a single operating system.
Main Menu Window

After logging on, a main menu window displays:

The title bar shows the name of the user logged on (left), the current date (right), and the Help and Logout hyperlink functions (on right below date). Clicking Help brings up help files, clicking Logout logs the user out of the system and clicking on the Options displays the configurable program options.

The left frame of this window shows the functions available for this program. To access a function, click the title (e.g., Single Scan Index).

Note: Positioning the mouse over the title displays a brief description for each function.

Options features:

Clicking the Options link displays the following:
This link displays on every section of DataMagine Web Scan and Index so the user can change these preferences at any time.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Backward:</td>
<td>Backwards searching only applies when working with the search results and is used to change the order of how the documents within a group appear in the image viewer window. For example, if there are 60 documents in a group, page 60 is the first page to display instead of page 1.</td>
</tr>
<tr>
<td>Cold Overlay:</td>
<td>This option, when checked, turns on COLD overlay setup so that COLD files can be displayed over image files. When this feature is checked and active this limits the Text Searching feature in the Search section.</td>
</tr>
<tr>
<td>View PDF as TIFF:</td>
<td>This option displays all .PDF file formatted documents and converts them to .TIFF file formats in the image viewer and the Thumbnail views of the View Batches section.</td>
</tr>
<tr>
<td>Show last page reached:</td>
<td>Having this option checked will display a notification message to the user each time the last page is reached when indexing a document has completed.</td>
</tr>
<tr>
<td>Open Batch to first un-indexed document’</td>
<td>If the option ‘Open Batch to first un-indexed document’ is unchecked: When opening a new batch to index, the document is opened at the last document that the user was viewing.</td>
</tr>
<tr>
<td></td>
<td>If the option ‘Open Batch to first un-indexed document’ is checked: When opening a new batch, the document is opened at the first un-indexed document in the batch.</td>
</tr>
<tr>
<td></td>
<td>For e.g.: if the batch has 5 documents, and document 1, 4 are indexed. And the user closes the batch when on document 5.</td>
</tr>
<tr>
<td></td>
<td>• Open Batch to first un-indexed document: Unchecked – Will open the batch on document 5.</td>
</tr>
<tr>
<td></td>
<td>• Open Batch to first un-indexed document: Checked – Will open the batch on document 2.</td>
</tr>
</tbody>
</table>
Chapter 2: Create Batch

Importing documents in batch allows the user to store the documents and index them at a later time. Batches are automatically saved in a folder created by the administrator, which allows other Imaging users (with the appropriate security level) the ability to view, manage, and index documents.

There are two options available for inputting documents: scanning paper documents and importing documents from an existing file. These documents may be scanned/imported one page at a time (discussed in Chapter 5: Single Scan Index) or in a batch, which can then be indexed for retrieval. Documents imported as a batch can also be managed, such as inserting new documents, removing a document, re-organizing the sequence, etc. (Discussed in Chapter 3: View & Manage Batches).

There is an option to discard blank backs of pages when duplex scanning. When the Scan duplex option is checked (this option will be checked by default) all pages scanned in within a byte range of 0-3000 are removed. Typically this range is set to detect blank pages.

There is also an option for a search to be run on text files in the viewer. This text search feature is only activated when a text file is in the viewer. It allows for specific values to be specified and looked for within documents while returning search results in the same window.

This chapter discusses how to create a batch using both the Scan and Import features.

- Click **Create Batch** on the Main Menu window (Figure 1-5). The corresponding window displays:
Quick Reference - Create Batch

This section provides a step-by-step outline of creating a batch. The next section provides the screen prints and details of the information outlined here.

Create Batch with Scanned Documents

☐ If necessary, select a scanner (on the Create Batch window, click Select Scanner).

☐ Scan the documents. The images display in the Document Viewer window.

☐ In the left frame, type a name for the batch.

☐ Type a security level.

☐ Select a user group.

☐ If applicable, type notes specific to the batch.

☐ Click the Create button.

The batch is created.

Create Batch with Imported Documents

☐ Click Import on the Create Batch window.

☐ Browse and select the documents to import. The images display in the Document Viewer window.

☐ Type a name for the batch in the left frame.

☐ Type a security level value.

☐ Select a user group.

☐ If applicable, type notes specific to the batch.

☐ Click the Create button.

The batch is created.
Create Batch with Scanned Documents

Prior to scanning, it may be necessary to select a scanner. On the Create Batch window (Figure 2-1), in the right frame, click **Select Scanner**. The Select Source window (TWAIN Interface) displays:

![Select Source Window](image)

- Click the scanner to use, then click **Select**.

- On the Create Batch window (Figure 2-1), in the right frame, click the **Scan Document(s)** icon.

The selected scanner’s Scanner Properties window displays. The following image is used as an example and does not represent all scanner options:

![Scanner Properties Window](image)
Determine the parameters for the scanned document, then click **Start**.

The documents are scanned and each image is shown in the Document Viewer window:

![Document Viewer](image)

*Figure 2-4*

The top of the document viewer has several icons:

- **Go**
- **Print**
- **Email**
- **Select Scanner**
- **Scan Document(s)**
- **Import Document(s)**
- **Page Up**
- **Page Down**
- **Rotate (rotates the document clockwise 45 degrees)**
- **Zoom In**
- **Zoom Out**
When the scan is complete, a confirmation window displays.

![Scanner Message Window](image)

- Continue to scan images or click **No** (indicating there are no additional pages to scan).

Once the scanning is complete and you are satisfied with the batch, define the parameters for the batch. On the left side of the Create Batch window:
Enter information in the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Batch Name:</strong></td>
<td>Assign a name for the batch. It is recommended this name be as descriptive as possible. Up to 30 characters may be entered. This is a required field.</td>
</tr>
<tr>
<td><strong>Security:</strong></td>
<td>Set the security access level for the batch from '1'- '1000'. Only users with this security level or higher have access to the batch. This is a required field.</td>
</tr>
<tr>
<td><strong>User Group:</strong></td>
<td>Select the user group that will have access to the batch from the drop down menu. Only users within this group with the appropriate security level have access to the batch. This is a required field.</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td>Enter any notes to help further identify this batch. This note displays with the batch (in the Notes field) on the View Batches window (Figure 3-1).</td>
</tr>
</tbody>
</table>

Click Create.
The batch is created and is now visible from either the Web or desktop client.

**Warning:** Clicking **Cancel** (and the “Main” or “Logout” links) clears all values and images.

### Create Batch with Imported Documents

- On the Create Batch window (Figure 2-1), click **Import**. The Select Document(s) window displays:

![Select Document(s) window](image)

- Locate the documents to import.

**Note:** It may be necessary to change the *Files of type* field to ‘All Files(*.*)’.

- Click the first file to be imported, press the `[Shift]` key and click the last file to be imported (see warning below).

**Warning:** When selecting the files to be imported, it is important to click the last file you wish to include in the batch **first**, then hold `[Shift]` and select the first file of the batch **last** (e.g., using (Figure 2-6), click “test(15)” first and “test(10)” last). This ensures they are imported in the proper order. This is due to constraints within Windows and is a known Microsoft® issue.

- Click **Open**.
Once the importing is complete and you are satisfied with the batch, define the parameters for the batch. On the left side of the Create Batch window:

![Create Batch Window](image)

- Enter information in the following fields:

<table>
<thead>
<tr>
<th><strong>Field Name</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Batch Name:</strong></td>
<td>Assign a name for the batch. It is recommended this name be as descriptive as possible. Up to 30 characters may be entered. This is a required field.</td>
</tr>
<tr>
<td><strong>Security:</strong></td>
<td>Set the security access level for the batch from <code>1</code> to <code>1000</code>. Only users with this security level or higher have access to the batch. This is a required field.</td>
</tr>
<tr>
<td><strong>User Group:</strong></td>
<td>Select the user group that will have access to the batch from the drop down menu. Only users within this group with the appropriate security level have access to the batch. This is a required field.</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td>Enter any notes to help further identify this batch. This note displays with the batch (in the Notes field) on the View Batches window (Figure 3-1).</td>
</tr>
</tbody>
</table>

- Click Create.

The batch is created and is now visible from either the Web or desktop client.

**Warning:** Clicking Cancel (and the “Main” or “Logout” links) clears all values and images.
Chapter 3: View & Manage Batches

The documents stored in batch may now be altered (having a new page added, removed, etc.) before indexing.

On the Main Menu window (Figure 1-5), click View Batch.

The corresponding window displays:

![View Batch Window]

The View Batch window shows the details of each batch, including when it was created, the number of documents/pages in the batch and how many have been indexed, and any notes that were added when creating the batch.

Several icons display at the top allowing the user to work with the batches:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unlock Batch</td>
<td>When a batch is open, the system ‘locks’ it and prevents other users from working in the batch. A batch may also be locked if a user’s system crashes while a batch is open. Clicking this icon unlocks the batch for further indexing. <strong>Warning:</strong> This option should only be used if the user knows the batch is not currently open by another user.</td>
</tr>
</tbody>
</table>
Manage Batch

Once a batch is saved within DataMagine, the user has the ability to work with the documents within the batch. The user may replace an existing document, insert a new document, add a blank page, etc. In addition, notes and other annotations may be attached.

This section discusses how to work with documents in a batch.

Select the batch and click the Manage Batch icon on the View Batches window (Figure 3-1).

The batch shows in thumbnail view in the left pane, with the selected image showing in the Document Viewer window:
Since only nine thumbnail views display, the user may select specific pages or use the Previous Group and Next Group icons to maneuver between the groups of pages.

Figure 3-2

These icons may be used to adjust the document by rotating the image, and viewing an area in closer detail.

Update Documents in a Batch

Once documents are in a batch, the documents may be moved, added, replaced, or deleted.

Insert

The insert option allows a user to place a document or blank page within the batch. On the Manage Batch window:

- Right-click on the page to the left of where the new page is to be inserted.

A menu displays.
Click one of the following options on the menu:

- Insert Blank
- Scan Insert (scan page(s) to insert)
- Import Insert (browse for the page(s) to insert)

The new (or blank) page is inserted to the right of the highlighted page.

**Move**

The move option allows a user to move documents to different locations within the batch. On the Manage Batch window (Figure 3-3):

- Right-click on the image to move. A menu displays (Figure 3-3).
- Click Move. A Move to window displays:
Select the page number to where the page is to be moved.

Click OK.

The page is moved and the other pages are renumbered.

Delete

The delete option allows a user to remove any document from the batch. On the Manage Batch window (Figure 3-3):

Right-click on the image to remove. A menu displays (Figure 3-3).

Click Delete. A confirmation message displays:

![Figure 3-5](image)

Click Yes.

The selected page is removed from the batch and the remaining pages are renumbered.

Replace

The replace option allows a user to replace an existing document within a batch with another document or a blank page. On the Batch Manage menu (Figure 3-3):

Right-click on the image to replace. A menu displays (Figure 3-3).

Click one of the following options:

- Replace Blank
- Scan Replace (scan page(s) to replace the selected page)
- Import Replace (browse for the page(s) to replace the selected page)

The page is replaced with the new (or blank) page.
Print Document

☐ Select a document on the Manage Batch window (Figure 3-2)

☐ Click the Print icon.

A menu displays:

![Print Current, Print All](image)

Figure 3-6

☐ Select either Print Current or Print All (all documents in the batch).

☐ Select the printer and click the Print option on the dialog window that displays.

The document is printed.

E-mail Document

☐ Select a document on the Manage Batch window (Figure 3-2).

☐ Click the E-mail icon.

A menu displays:

![Email Current, Email All](image)

Figure 3-7

☐ Select either Email Current or Email All (all documents in the batch).

The user’s default E-mail program is launched with the document as an attachment.

☐ Send the e-mail using standard operating procedures.
Annotations

☐ Select a document on the Manage Batch window (Figure 3-2).

☐ Click the Annotation icon.

A menu displays:

![Figure 3-8: Menu with options]

---

**Add/Edit Annotation**

☐ Select **Add/Edit Annotation** on the Annotation menu (Figure 3-8).

The Annotation toolbar displays:

![Figure 3-9: Annotation toolbar]

Each annotation available on the toolbar is discussed below. A few annotations have similar uses and it is up to the user which method is preferred.

**Note:** Not all annotations are compatible with other viewer programs (e.g., one viewer program shows blocked text, text, highlighting and ‘sticky notes’ but not stamps, hot spots, etc.).

<table>
<thead>
<tr>
<th>Annotation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select:</td>
<td>The tool is used to select existing annotations and deactivate other annotations (e.g., if drawing a line, the function remains active so that every time the user clicks on the page, the line continues to be drawn; therefore, selecting this option deactivates the line annotation tool).</td>
</tr>
<tr>
<td>Line:</td>
<td>This tool draws single lines, allowing the user to underline passages or cross through information.</td>
</tr>
<tr>
<td>Rectangle:</td>
<td>This tool draws a hollow square or a rectangle.</td>
</tr>
<tr>
<td>Ellipse:</td>
<td>This tool draws a hollow circle or ellipse.</td>
</tr>
<tr>
<td>Polyline:</td>
<td>This tool draws jointed lines, connected by nodes. Nodes act as ‘joints’, which allows the user to change a line’s direction.</td>
</tr>
<tr>
<td>Polygon:</td>
<td>This tool draws a hollow multi point box, which can be used to group text or objects that won’t fit in a standard square or rectangle box.</td>
</tr>
<tr>
<td></td>
<td>It is drawn using a polyline like the above annotation; however, when the two ends of the line meet, a closed box is formed. Once drawn, the shape can be changed using the nodes.</td>
</tr>
<tr>
<td>Pointer:</td>
<td>This tool draws an arrow, which can be used to designate important information.</td>
</tr>
<tr>
<td>Freehand:</td>
<td>This tool allows the user to draw free form.</td>
</tr>
<tr>
<td>Highlighter:</td>
<td>This tool highlights text, just like a highlighter marker. The default color is yellow; however, this can be changed by accessing the properties menu.</td>
</tr>
<tr>
<td>Redact:</td>
<td>This tool draws a sold square/rectangle and can be used to block out text or data.</td>
</tr>
<tr>
<td>Text:</td>
<td>This tool creates a text box and can be used to type notes or information related to the page or document.</td>
</tr>
<tr>
<td>Note:</td>
<td>This tool creates a ‘sticky note’ and can be used to type notes or information related to the page or document.</td>
</tr>
<tr>
<td>Stamp:</td>
<td>This tool draws a hollow box and may also be used attach an image or other file to the document.</td>
</tr>
</tbody>
</table>
Rubber Stamp: This tool places a standard phrase or comment on the document (e.g., ‘Approved’, ‘Declined’, etc.). When selected, a menu displays with a list of words or phrases that can be ‘stamped’ on to the document. The rubber stamp may be customized as well. Refer to Customize Rubber Stamp (below) for details.

Hotspot: This tool draws a box with an image of flames. The image may replaced at any time with a metafile.

Annotation: Description

Freehand Hotspot: This tool is identical to the Hotspot tool (above), except this option allows the user to draw a shape other than a box to create the hotspot.

Button: This tool is used to create a Windows style button on the document, with text. The button is for display only.

Point: This tool draws a tiny ‘x’ on the document. The size of the ‘x’ cannot be changed or modified; however, it may be replaced with a bitmap or other file.

Audio: This tool is used to add audio files (.wav) to the document

Ruler: This tool draws a ruler and is used for measuring (primarily for schematics or blueprints).

Crossproduct: This tool draws a protractor and is used for measuring angles (primarily for schematics or blueprints).

Pushpin: This tool draws a note with a pushpin and can be used to type notes or information related to the page or document.

Most annotations may be modified (e.g., font, color, text, etc.), which is discussed below.

Modify Annotations

Once an annotation has been added to the document, it may be modified by changing the size, color, etc.

- Right-click on the annotation, select [Name of Annotation] Properties. Additional options display (the sample below is specific to the Note annotation; however, most of the property options are the same):
Select one of the following options:
- Name…
- Foreground Color…
- Background Color…
- Font…
- Text…

Modify the properties of the selected style. Once the properties are set, the change is immediate.

Save Annotation

Once an annotation has been added to the document and the properties have been set, the annotation must be saved.

Select Save Annotation on the Annotation menu (Figure 3-8).

If the document is closed and the annotation has not been saved, a prompt window displays asking the user whether the annotations should be saved.

Hide Selected Annotation / Hide All Annotations / Show Annotation

The ‘hide’ options may be selected to temporarily remove a single annotation or all annotations on the document.
These options do not delete the annotation, just hide them from view.

☐ Select either **Hide Selected Annotation** or **Hide All Annotations** on the Annotation menu (Figure 3-8).

☐ Select **Show Annotation** to show the annotation(s).

**Customize Rubber Stamp**

☐ This option is only enabled with the annotation toolbar is closed. Upon selection, the Ann Custom Stamp--Web Page Dialog window displays:

![Customize Rubber Stamp Dialog](image)

This document discusses how to create a text rubber stamp. The process is similar for an image stamp; the only difference being the user would browse for an image versus type the text.

☐ Click **Create Text** if creating a text stamp.

The Ann Text Stamp - Web Page Dialog window displays:
Type the name of the stamp, then enter the text to display on the stamp. Using ‘~x’ inputs the date and ‘~X’ inputs the time.

- Click **Font** to modify the font.
- Click **OK** when complete.

The new stamp is added.

- Continue to add stamps or click **OK**.

**Output with Annotations**

This option must be selected if the user wants to e-mail, print or fax the document with the annotations.

- Select **Output with Annotations** on the Annotation menu (Figure 3-8).

A check mark displays next to the option on the menu.

- Click the option again to deactivate this function.

**Note:** When a document containing annotations is output from Imaging, it is saved as a .tiff file. Any image viewer program (e.g., Microsoft Viewer) may be used to open the document; however, it must be configured to display .tiff files.
Rotate/Rotate Save

- Select a document on the Manage Batch window (Figure 3-2).
- Click the Rotate icon.

A menu displays:

![Rotate Rotate Save](image)

- Click **Rotate** to rotate the document temporarily.
- Click **Rotate Save** to rotate the document and save the rotation.

**Note:** Both options rotate the document 45 degrees. To rotate further, click the option again.

Zoom In/Zoom Out/To Width

On the Annotation menu (Figure 3-8):

- Click the Zoom In icon to make the image larger.
- Click the Zoom Out icon to make the image smaller.
- Click the Zoom In icon to make the image fit the width of the Document Viewer window.

This feature is temporary. The zoom settings are not retained once the user moves to another page or document.
Chapter 4: Batch Index

Indexing provides the information necessary for searching and allows users to organize data for easy retrieval. The administrator or manager of the department establishes a set of criteria for different types of documents. This criteria, called index titles, tells the user what information needs to be recorded from the document (e.g., customer name, invoice #, invoice date, etc.). The user knows what information to index based on the index title. These index titles are then grouped together into a view. When indexing, users select the view most applicable to the documents being indexed.

If there are a group of documents that have the same index values, a different method may be used called process indexing. A process is associated with a view and once the values have been entered into the view, the system automatically indexes the remaining documents using those same values.

Documents may also be indexed more than once with different values.

☐ Click View Batch on the Main Menu window (Figure 1-5).

The corresponding window displays:

Quick Reference - Index Batches

This section provides a step-by-step outline of indexing a batch. The next section provides the screen prints and details of the information outlined here.
Index Batch

☐ Select a batch on the View Batch window and click the Index icon.

☐ Select a view and process on the View Batch window.

☐ Type the index values.

☐ Determine if any values are to be repeated.

☐ If applicable, change the security level.

☐ Click **Process**.

The batch is indexed.

Index Batch

This section discusses how to index the documents in a batch.

☐ Select a batch and click the Index icon on the View Batch window (Figure 4-1).

The corresponding window displays:
To index documents:

☐ Select a view and process in the left frame. The index titles associated with the view display below the view panel (e.g., ‘*USER NAME’, ‘AMOUNT’, etc.).

☐ Enter the information from the document for each index title in the Index Values fields.

**Note:** If any values were predefined by the system’s administrator, a drop down menu displays in the Value field. Depending on the settings, the user may be required to select an option versus type the value in the field.

☐ If applicable, click in the Rpt checkbox to retain that index value for the next document (e.g., if checking the Rpt field for *USER NAME, the value entered for the customer’s name carries over to the next document). To repeat all values, click the checkbox in the column header.

The Doc. Security index title is present in all views and automatically defaults to the security level of the user.

**Note:** The Index Value column may be widened by clicking on the separator line in the header and moving the cursor horizontally.

☐ Click Process.

A confirmation message displays below the index values.

**Note:** If an index value was required and it was left blank, an error message displays. A value must be entered in the corresponding field before the system will index the document.

The batch is indexed. The User, Non-Indexed, and Indexed columns on the View Batches window (Figure 4-1) are updated to reflect the change (“Done” displays in place of the user in the User column).
Chapter 5: Single Scan Index

Documents do not have to be placed in a batch in order to index. DMS Web allows the user to index documents immediately upon scanning or importing (this feature is not limited to scanning).

The process is simple and uses the same procedures discussed for importing/scanning documents and indexing.

☐ Click Single Scan Index on the Main Menu window (Figure 1-5).

The corresponding window displays:

Quick Reference - Single Scan Index

This section provides a step-by-step outline of indexing a document. The next section provides the screen prints and details of the information outlined here.

☐ Import or scan the document to be indexed on the Single Scan & Index window.
Select a view and process in the left frame.

Type the index values.

Click **Process**.

The documents are indexed.

**Import/Scan and Index**

Import or scan the document to be indexed on the Single Scan and Index window (Figure 5-1), as described previously in this chapter. The document is loaded into the viewer:

![Image of the viewer window](https://example.com/image.png)

**Figure 5-2**

**Warning:** Clicking either the “Main” or “Logout” links automatically clears all values and images!

Select the view and process to use, then define the index values.

Click **Process**. The documents are indexed.
Chapter 6: Search Indexed Documents

After documents have been indexed, they are stored in a predefined location on the network. Typically, this information is public (accessible by more than one user), allowing others to retrieve the documentation based on the indexed values.

Imaging does not require the user to know every value indexed to retrieve a specific document. Several search methods are available:

- Wildcard search ("*" - which opens the search to include a variety of factors)
- Conditions search (e.g., less than, greater than, etc.)
- And/or search (using the combination or the exception rules)
- Indexer search (the user who indexed the document)
- Index date search (the actual date the document was indexed)

In addition, the search results can be exported as a file that can be used by other programs to analyze and track the search results.

This chapter discusses the different methods of searching for indexed documents.

☐ Click **Search** on the Main Menu window (Figure 1-5). The corresponding window displays:

![Figure 6-1](image)

The views and processes are shown in the upper left pane. Once a view/process is selected, the index titles associated with the view are shown in the lower left pane.
Quick Reference - Document Search

This section provides a step-by-step outline of the search process. The remaining sections in this chapter provide the screen prints and details of the information outlined here.

Basic Search

- Select a view on the Search window. The index titles associated with the view display in the lower left frame.
- Enter one or more search values.
- If a value is not known, click the $W$ box (wildcard).
- Click the $R$ box to retain values for the next search.
- Click the Advanced Search icon (the magnifying glass with a ‘+’) for advanced features. Select a condition, and/or option, enter a date processed, or indexer.
- Click the Begin Search icon (the file cabinet with a magnifying glass).

Any documents matching the criteria entered display as a list in the Search Results tab.

Text Export Search Results

- Select the documents to be exported on the Search window.
- Click the Export icon (the two documents with a red triangle and blue circle). The Export Results window displays.
- On the Text Export tab, select either Fixed Length or Delimited, then set the parameters for that option.
- Enter or browse to the location where the documents are to be saved.
- Determine the action to be taken if this is a duplicate document and select either Overwrite or Append.
- Click Start or Done.

The documents are exported as a text file.
Basic Search Methods

A basic search is the simplest way to retrieve documents if the user knows all or some of the values with which the document was indexed. Similar to indexing, the search function uses views and index titles to retrieve documents. Even if a value is not known, a wildcard may be used in place or in addition to index values.

This section discusses how to search for documents using different search methods.

Basic Search

On the Search window (Figure 6-1), in the left pane:

- Click a view. The associated index titles display in the bottom portion of the window.
- Enter the search data in the Value field(s). Not all fields are required; however, the more fields defined, the narrower the search.
- If a value is not known, a wildcard may be used. Click in the W field box to use a wildcard (Wildcard Search is discussed in more detail later in this section).
- Click the Begin Search icon.

Figure 6-2

☐ Click a view. The associated index titles display in the bottom portion of the window.

☐ Enter the search data in the Value field(s). Not all fields are required; however, the more fields defined, the narrower the search.

If a value is not known, a wildcard may be used. Click in the W field box to use a wildcard (Wildcard Search is discussed in more detail later in this section).

☐ Click the Begin Search icon.
A new tab displays in the Search window with the results:

![Search Window](image)

All documents matching the search criteria are loaded. Each document is separated into segments and the criteria used for the search are shown as the column headings. In addition, the number of pages associated with the document, the folder, and document type are shown.

- **Note:** if the ‘Do NOT show search result box’ setting is ON for the view, the Search Results tab does not appear and all the documents that match the search criteria open up in the viewer. Highlight a segment and click the Load to Viewer icon.

**Note:** If no results were found, the message “No results found” displays at the bottom of the Search window.

In addition to the search results, several icons become active on the toolbar. These icons are discussed below.

Once the user clicks the Load to Viewer icon, the documents are opened up within the Document Viewer.

Documents may be printed, e-mailed, saved to a different location, and modified by adding/editing annotations. Refer to Chapter 3: View & Manage Batches for a description of these features.
Search Window: Icon Description

The toolbar contains the functions necessary for working in the Search window. This is a brief description of each icon. Functions that require more detail are discussed throughout this chapter:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Search:</td>
<td>Click this icon to display additional search options in the lower portion of the Search window. Refer to the Advanced Search Methods section for more information.</td>
</tr>
<tr>
<td>Clear Search Parameters:</td>
<td>Click this icon to clear all text entered in the Value fields.</td>
</tr>
<tr>
<td>Begin Search:</td>
<td>Click this icon to begin the search using the criteria entered within the Value fields.</td>
</tr>
<tr>
<td>Load to Viewer:</td>
<td>Click this icon to open the selected results into the Document Viewer window.</td>
</tr>
<tr>
<td>Export:</td>
<td>Click this icon to export the search result information to a text file. The text file may then be opened in a separate program and used to track and analyze search results.</td>
</tr>
<tr>
<td>Select All Results:</td>
<td>Click this icon to select all search results (i.e., segments) for exporting, emailing or printing.</td>
</tr>
<tr>
<td>Previous Segment:</td>
<td>These icons only become active when there are more than 500 segments on display in the Search window. Once active, these icons are used to maneuver between the segments.</td>
</tr>
<tr>
<td>Next Segment:</td>
<td></td>
</tr>
</tbody>
</table>

Wildcard Search

The Wildcard feature is used when either all or some of an index value is not known. Wildcards may be used independently or in combination with other values.
Independent Wildcard

- Click in the $W$ field box for an index title with no values. An asterisk displays (e.g., Customer # in the figure above).

**Warning:** Performing a search solely with wildcard values can tax the system’s resources and slow down the search process if there are a large number of indexed documents.

Combination Wildcard

If only a partial value is known, the wildcard may be used in combination with the text. Type an asterisk (*) either before, after or on the outside of the text.

**For Example:**

To search for a last name of either ‘Smith’ or ‘Smyth’, type ‘Sm*’. All names beginning with ‘Sm’ are returned.

To conduct a search with ‘Bros’ in the middle of the company name, type ‘*Bros*’. All customers with ‘Bros’ in the middle of their name are returned.

**Note:** This feature cannot be used for fields containing a date (e.g., 10/*/2004). An independent wildcard can still be used.

Text Searches

To do a text search perform the following steps below:

- Click on the Create Batch section.

- Click on an existing search view and in the displayed index values enter in the search data criteria for an indexed text file.
Note: This feature only is active for text files.

- Click on the Text Search button in the right hand pane. The Text Search window displays:

- Enter values into the Text to search textbox.

- Click the Search the text button.

Results will be displayed in the field below stating information such as how many matches of the text was found in the document and what page this information was found on in the job.

Advanced Search Methods

Advanced searching may be used to return a range or group of documents at one time rather than entering search criteria multiple times.

- Click the Advanced Search icon on the Search window. The window refreshes with additional search parameters:
Two new fields and two new index titles display:

- Condition (column header)
- And/Or (column header)
- Date Processed (index title)
- Indexer (index title)

**Condition**

☐ Click the *Condition* field to display a down arrow button, then click the button to display a menu:

<table>
<thead>
<tr>
<th>Index Titles</th>
<th>Condition</th>
<th>Index Value</th>
<th>Index Value2</th>
<th>An</th>
</tr>
</thead>
<tbody>
<tr>
<td>USER NAME</td>
<td>=</td>
<td>=</td>
<td></td>
<td>And</td>
</tr>
<tr>
<td>AMOUNT</td>
<td>=</td>
<td></td>
<td></td>
<td>And</td>
</tr>
<tr>
<td>INVOICE NUMBER</td>
<td>&lt;&gt;</td>
<td></td>
<td></td>
<td>And</td>
</tr>
<tr>
<td>Date processed</td>
<td>&gt;</td>
<td></td>
<td></td>
<td>And</td>
</tr>
<tr>
<td>Indexer</td>
<td>&lt;=</td>
<td></td>
<td></td>
<td>And</td>
</tr>
<tr>
<td></td>
<td>Between</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Equal To Multiple</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select one of the following eight conditions:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Select this option to search for documents that match (exactly) the value entered in this field. For example: Typing “Mill” only returns documents indexed with the value “Mill”. If a document was indexed with the value “Paper Mill”, it is not returned.</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Select this option to search for documents that are not indexed with this value. For example: If typing “Mill” as the customer name, all documents not containing the word “Mill” are returned.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Select this option to search for documents with an index value greater than the value entered in this field. This option works with all date characters. For example: When searching for invoices from a certain date, typing “2/28/2004” returns all documents with an invoice date starting “3/01/2004” and greater.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Select this option to search for documents with an index value greater than or equal to the value entered in this field. This option works with all date characters. For example: When searching for invoices from a certain date, typing “2/28/2004” returns all documents with an invoice date starting “2/28/2004” and greater.</td>
</tr>
<tr>
<td>&lt;</td>
<td>Select this option to search for documents with an index value less than the value</td>
</tr>
</tbody>
</table>
entered in this field. This option works with all date characters.

For example: When searching for invoices from a certain date, typing “2/28/2004” returns all documents with an invoice date “2/27/2004” and earlier.

<=: Select this option to search for documents with an index value less than or equal to the value entered in this field. This option works with all date characters.

For example: When searching for invoices from a certain date, typing “2/28/2004” returns all documents with an invoice date starting “2/28/2004” and earlier.

Between: Select this option to search for documents with an index value that matches the values in between the two values defined in this field. When selected, a Value 2 column appears to the right of the Value column (both Value fields are required). This option works with all date characters.

For example: When searching for invoices from a certain date, typing “2/28/2004” and “4/1/2004” returns all documents with an invoice date starting “3/1/2004” and “3/31/2004”.

Equal to Multiple Values: Select this option to search for documents that match up to multiple index values defined in this field. Separate the index values field using the “@@” characters.

For example: When searching for invoices with a certain index value, type in values that match up to both indexes in the format “123@@ABC.” This will return search results with all documents with index values that match both 123 and ABC in the search results tab.

CV Continue to define additional search criteria, then click the Begin Search icon.

And/Or

Click in the And/Or field to display a down arrow button then click the button to display a drop down menu:

<table>
<thead>
<tr>
<th>Index Value</th>
<th>AndOr</th>
<th>W</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value2</td>
<td>And</td>
<td></td>
</tr>
<tr>
<td></td>
<td>And</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>And</td>
<td></td>
</tr>
</tbody>
</table>

Select one of the following two options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Select this option to search for documents containing the value entered in this field.</td>
</tr>
</tbody>
</table>
For example: If “paper street” is entered for customer name, documents are retrieved that contain both ‘paper’ and ‘street’ in the name, such as “Wall Street Paper Co.” or “Paper Street Lodging”.

**Or:**
Select this option to search for documents containing at least one of the values entered in this field.

For example: If “paper street” is entered for customer name, documents are retrieved that contain ‘paper’ OR ‘street’ in the name, such as “Logwood Paper Products” or “Main Street Realty”.

Continue to define additional search criteria, then click the Begin Search icon.

### Date Processed/Indexer

These fields allow the user to search for documents by the date they were indexed and/or the user who indexed them.

![Figure 6-8](image)

Define one or both index titles:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date Processed:</strong></td>
<td>This field is used in conjunction with the Condition field. Enter the date when document was indexed and select a condition.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The Wildcard Combination feature (e.g., 10/*/2004) cannot be used for fields containing a date. An independent wildcard may still be used.</td>
</tr>
<tr>
<td><strong>Indexer:</strong></td>
<td>Enter the sign on ID of the user who indexed the documents. It is recommended this field be used in conjunction with another index title to narrow the search results.</td>
</tr>
</tbody>
</table>

Continue to define additional search criteria, then click the Begin Search icon.
Export Search Results

Once a document has been retrieved, it is available for viewing. The results (not the documents) of any search can be exported and saved as a file for use by another application.

☐ Click the Export icon on the Search window. The Search Export-Web Page Dialog window displays:

![Search Export-Web Page Dialog](image)

☐ Define the following fields:

<table>
<thead>
<tr>
<th>Option/Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Fixed Length:** | Select this option to set the spacing between the columns on the report to a specified number of characters (‘30’ is the default).  
For example: To display the Pages column and the Folder column with 20 spaces between them, enter “20”. The columns are separated by 20 spaces (the periods represent a space and do not actually display): “Pages................Folder”  
This field is required if the Delimited option is not selected. |
| **Delimited:** | Select this option to set the spacing between the column and the separator. The columns are separated by a special character within this field (the default character is a semi-colon).  
Place the cursor in the field on either side of the special character (e.g. semicolon) and press the [Space Bar] for each space.  
For example: Place two spaces before the semi-colon and after the |
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>semi-colon.</strong></td>
<td>The columns appear as follows:</td>
</tr>
<tr>
<td><strong>“Pages ; Folder”</strong></td>
<td>This field is required if <em>Fixed Length</em> is not selected.</td>
</tr>
<tr>
<td><strong>Save To:</strong></td>
<td>This field defaults with the local folder, which is set by the administrator. To change</td>
</tr>
<tr>
<td></td>
<td>the location, click <strong>Browse</strong> and select a path. Enter a file name and select a file</td>
</tr>
<tr>
<td></td>
<td>type, then click <strong>Save</strong>.</td>
</tr>
<tr>
<td><strong>Overwrite:</strong></td>
<td>Select this option to overwrite any existing export files in the folder. This field is</td>
</tr>
<tr>
<td></td>
<td>required if <strong>Append</strong> is not selected.</td>
</tr>
<tr>
<td><strong>Append:</strong></td>
<td>Select this option to append the current export information to any existing export files</td>
</tr>
<tr>
<td></td>
<td>(i.e., if an export file had previously been created, the new information would be added</td>
</tr>
<tr>
<td></td>
<td>to the existing one). This field is required if <strong>Overwrite</strong> is not selected.</td>
</tr>
</tbody>
</table>

- Click Save. The search results are now saved as a file in the specified location.
Chapter 7: Create DocFlow Job

DocFlow jobs can also be created using the DataMagine Web and viewed at a later time in the DataMagine Client. The user has the option to create the Job with the documents in the image viewer by specifying the destination of a business process template, user group, or user within DataMagine.

This chapter discusses the method of creating a docflow job.

- Click Create DocFlow Job on the Main Menu window (Figure 1-5). The corresponding window displays:

![Image of Create DocFlow Job window](image)

- Place several documents into the image viewer by either scanning documents in or importing documents.

- Specify the different fields for the DocFlow Job listed in the following image:
<table>
<thead>
<tr>
<th>Option/Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Name:</td>
<td>This is the name used to identify the job. This is a required field.</td>
</tr>
<tr>
<td>Job Description:</td>
<td>This is the text that can be entered as an extended description of the job.</td>
</tr>
<tr>
<td>Security:</td>
<td>Set the security access level for the batch from ‘1’ - ‘1000’. Only users with this security level or higher have access to the batch. This is a required field.</td>
</tr>
<tr>
<td>Job Attachment:</td>
<td>This is the text that displays with the job when it is opened.</td>
</tr>
<tr>
<td>Routing Destination:</td>
<td>This is the location within DocFlow the Job will be created under. The different options can be a Business Process Template, User Grouping, or User. This is a required field.</td>
</tr>
<tr>
<td>Break by Pages:</td>
<td>This option breaks the documents inside the image viewer into the amount of documents in each DocFlow job. So if 2 was entered into the field, every 2 documents a new DocFlow Job would be created.</td>
</tr>
<tr>
<td>Break Multiple Pages:</td>
<td>This option turns multiple page documents into individual page documents within the same job.</td>
</tr>
</tbody>
</table>

☐ Input any index information into the Routing Information window for each index.
Click on the Create button. The following message should display stating the documents were created successfully:

![Message from webpage]

Docflow job created successfully. It contains 5 document(s).