



SimpleIndex 7.0 MANUAL

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SimpleIndex Documentation
























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1 Introduction

1.1 Welcome to SimpleIndex!

SimpleIndex is a tool to automate the process of organizing large numbers of scanned images or electronic documents.

As its name implies, SimpleIndex was designed to be easy to use. Relative to other document capture solutions with this much power and flexibility, SimpleIndex is much simpler — especially for the operator. It does this by providing a smooth workflow that takes the user automatically through the stages of scanning, processing, indexing and exporting documents. This design enables SimpleIndex to perform unique 1-click scanning and unattended processing jobs.

This manual describes the features of SimpleIndex, as well as giving an overview of how to configure SimpleIndex to perform several common scanning tasks.

1.2 Conventions Used in This Manual

- *Italicized* terms refer to specific settings, buttons or menu items within SimpleIndex.
- Numbers in parentheses, such as (5.4.3), contain links to the section in parentheses for further information on the current setting or topic.
- Several terms are used in this manual without providing further definition. If you are unsure what is meant by a certain term, you may find it in the Glossary section (9).

1.3 Who Should Read This Manual?

The SimpleIndex manual is designed to educate system administrators who will configure SimpleIndex jobs. System administrators should read this manual and familiarize themselves with those features they intend to use. Scanner operators should read section 7 *Running Jobs* to become familiar with the options available during batch processing.

1.4 New Features in Version 7

Version 7 provides significant upgrades to the OCR and Barcode recognition technology, making it much faster and more accurate than previous versions. Other key additions are:

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- ABBYY FineReader OCR engine (5.6)
- Searchable PDF output (5.6.5.4)
- Automatically convert MS Office & HTML documents to PDF (5.3.4.7)
- Upgraded barcode engine with improved speed and accuracy (5.5)
- Run multiple copies of SimpleIndex at once
- Read (5.4.3.3.6) and write (5.4.5.3) property tags and EXIF data for images, MS Office & PDF files
- Improved server interface; run multiple unattended jobs (8.3)
- View multiple pages while scanning in ISIS mode (7.4.2.6)
- Parse folder and filenames with fixed fields (5.4.3.3.6)
- Output data to XML (5.8)
- Scan directly to network folder option with real time processing (5.2)
- SimpleExport conversion tool uses XSLT to transform index data files into any format

1.5 Unique Features

SimpleIndex has many unique features that few other desktop scanning applications have.

1.5.1 1-Click Processing

SimpleIndex is designed to streamline document scanning and indexing in a single-user environment. It does this by performing all of the steps in the scanning process in sequence. With sufficient automation using OCR, barcodes and database lookups, it is possible to perform the entire workflow with a single mouse click. For more information see *Automating Data Capture* (3), *Pre-Index Batch* (5.4.1) and *Unattended Processing* (8.3).

1.5.2 Template & Dictionary Matching OCR

This simplified version of what is commonly known as ***Unstructured Forms Processing*** allows you to automatically extract index information no matter where it appears on the document. Most “Zone OCR” solutions only work if the information appears in exactly the same place on every page. SimpleIndex allows you to automate indexing as long as the OCR field (5.4.3.1.9) matches a unique pattern (5.4.3.3.1) or pre-defined list of values (5.6.3).

1.5.3 MS Office and PDF Processing

SimpleIndex’s Template and Dictionary Matching OCR (5.6.3) functions can be used with MS Office and PDF files to index and organize them

automatically. SimpleIndex uses the existing text in these files instead of OCR, so the process is instantaneous and the accuracy is 100%.

Other Office and PDF functions include:

- Split, join & merge PDF files (5.3.4.6)
- Convert images to PDF and PDF to images (5.3.4.7)
- Convert MS Office, HTML and text files to PDF (5.3.4.7)
- Automatic bookmarking of PDFs based on index values (5.4.5.4)
- Set Office and PDF meta tags (5.4.5.3)
- Full support for PDF/A format (5.3.5.2)
- OCR to searchable PDF with hidden text (5.6.5.4)
- Support for encrypted PDF files (5.10.3)
- View or edit files in embedded Acrobat or MS Office if installed

1.5.4 Command Line Interface

The *Command Line Interface* (8) allows SimpleIndex to be integrated with custom software solutions with minimal programming. This interface allows you to specify all job settings, set index values and process images with a single command.

SimpleIndex also has the ability to run a command line application automatically before or after each batch (5.3.2). These can perform file format conversions on the import and export files, upload files to an FTP server, email files or launch a custom application integration.

1.5.5 Document Presence Auditing

Some applications have a set of standard documents that are required to be present in each batch (5.10.2.4). With SimpleIndex you can specify a list of required documents then audit each batch at the end to ensure all are present. Any missing pages may be scanned and indexed automatically from this screen as well.

1.5.6 Distributed Document Capture

SimpleIndex makes it possible to enable *Distributed Document Capture* (2.6) in your organization. SimpleIndex is unique compared to other distributed capture solutions in that the entire process takes place at the point of capture, including barcode recognition, OCR and index validation. No server component is required. Despite being serverless, job configurations can still be centrally managed by hosting them on a shared drive or web page.

1.5.7 Open Database Integration

Another feature that makes SimpleIndex great for integration with custom programs is its open database integration (5.9). Instead of using a proprietary database, SimpleIndex allows you to map its index fields to fields in any database table. It can be configured to create new records (5.9.3.2), update existing ones (5.9.3.3, 5.9.3.5) or retrieve them for viewing (5.9.3.4). These are the three basic functions for working with database records and what gives SimpleIndex its flexibility. By implementing database interaction with generic functions, SimpleIndex is able to interface with and perform these functions on any database.

SimpleIndex also has a standard Database Autofill (5.4.4) feature that lets you populate index fields from existing data in your database. This is not a unique feature, but is still one of the most useful and powerful ways of automating document capture.

1.5.8 OMR and OCR Document Separation

SimpleIndex offers a unique new approach to determining where the first page of a new document starts. Traditionally, barcode separator sheets are inserted during document prep to mark the start of a new document. It is wasteful and time-consuming to insert them between each file, especially if the files are small (2-20 pages).

SimpleIndex takes advantage of OMR (5.4.3.1.3) technology to provide an easier solution to this problem. Simply take a felt pen and make a black mark on the upper-left corner of the first page of each new document. SimpleIndex will scan automatically to numbered multi-page files, with a new file created each time a mark is detected (5.4.6.1). These files can then be indexed and exported with a second SimpleIndex job.

SimpleIndex can also use OCR to locate the first page of a new document by finding unique keywords or patterns of text on the page. If the same page is used as the first page of each document this method can be used to identify it without additional document preparation.

2 Designing Your Imaging Solution

If you have not yet decided on a plan for how to organize your scanned images for later retrieval, you should take some time to consider the possible options. There are various ways to store your document images for later retrieval once they have been scanned with SimpleIndex:

1. Use SimpleSearch to search and view documents (2.1).
2. Use Windows folders & filenames to organize and find your files, and free viewers like Windows Picture & Fax Viewer or Adobe Acrobat to view them (2.2).
3. Use enterprise document management software for security, regulatory compliance, web viewing, workflow and other features (2.3).
4. Use a database or spreadsheet such as MS Access and Excel to import the index data and provide links to the stored document images. Clicking the links can open the image in a free viewer like Adobe Reader or Windows' built-in image viewer (2.4).
5. Integrate SimpleIndex directly with your custom application using the *Command Line Interface* (2.5).
6. Use tools like [Google Desktop](#), [Window Search](#) and [SharePoint](#) to find documents scanned to Windows folders. SimpleIndex sets document properties (5.4.5.3) automatically, which these programs use to index files and rank search results.

Distributed Capture implementations will also be discussed in this chapter (2.6).

2.1 SimpleSearch

SimpleSearch allows you to search for and view documents linked to a database. The user is presented with a list of fields where they may enter search criteria. Running the search retrieves the matching images and displays them (7.5).

SimpleSearch is part of the SimpleIndex application. When a SimpleSearch license is activated, all scanning and indexing functions are

disabled and hidden from the user. Only jobs that are configured for *Retrieval* mode (5.9.3.4) can be opened.

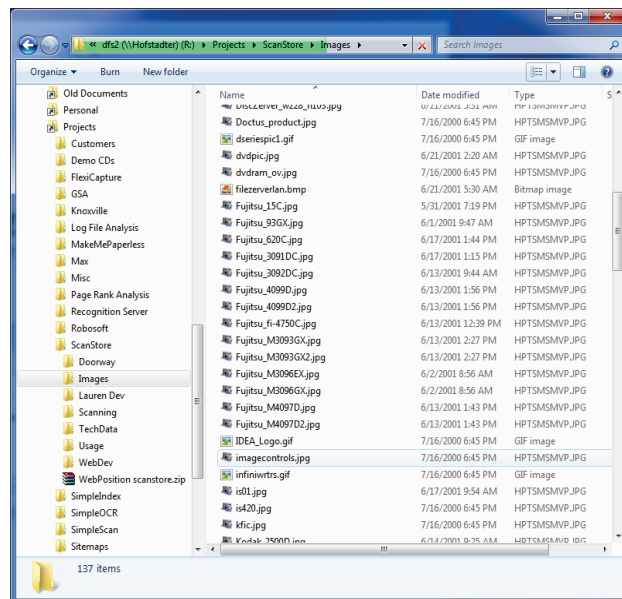
SimpleIndex also has a *Media Wizard* (7.4.7.6) that lets you copy your database and images to a CD or DVD automatically. The disc contains a start page that opens automatically when it's loaded, giving the user the option to install SimpleIndex or search the disc. SimpleIndex configurations are created automatically and installed on the disc, allowing the user to search the images in SimpleSearch.

2.2 Using Windows Folders & Filenames

Unlike other document management applications, SimpleIndex requires no additional software to find and view your images. All files scanned with SimpleIndex can be stored using meaningful folder (5.4.3.5) and filenames (5.4.3.6) that let you find any document even if your database has become corrupt or obsolete. Many legacy document management systems have been phased out, leaving their owners with unsupported software, proprietary databases and numbered files that can't be identified without a long and costly conversion. SimpleIndex uses no proprietary databases, file types, naming conventions or anything else that will prevent you from accessing your critical documents at any future date.

Windows folders and filenames work just like a filing cabinet, organizing your files hierarchically and providing all the information you need to find the file you're seeking. SimpleIndex lets you create a Windows folder hierarchy very quickly and easily.

Instead of manually creating each folder and typing the full filename for every document (like a traditional "Save As" window), SimpleIndex lets you enter your folder and file labels as index fields. This standardizes the folder and file structure, giving each of your documents a unique and meaningful label.



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Simply share the image folder and all the users on your network can now view these files on their computer without any additional software required. These folders can also be copied to CD or DVD for archival or distribution.

Since this option requires no additional software to search and view documents, it is the best solution for small businesses or departments with limited budgets for scanning.

2.3 Using a Document Management System

There are a wide variety of document management systems available on the market today. They perform the tasks of managing stored images and index data and giving users an interface to search for and view these images. Many perform advanced functions like workflow management, revision tracking and access auditing for HIPAA compliance. SimpleIndex has the ability to interface with these systems, making it an ideal scanning front-end for use with most document management systems on the market.

Integration with document management software is done via the *Index Log Files* (5.8) that SimpleIndex creates. Documents are scanned and indexed with SimpleIndex, and a log file is created that lists each image scanned and the index information associated with it. Virtually all document management software comes with standard or optional components that allow you to automatically import images and index information in the format SimpleIndex provides.

Many document management systems have a scanning module that is sold separately, at significantly greater cost than SimpleIndex. With a single scanner, SimpleIndex can provide an easier and more cost-effective scanning interface than the default module. With multiple scanners, the low cost of SimpleIndex makes it possible to implement *Distributed Document Capture* (2.6) for a fraction of what it would cost otherwise.

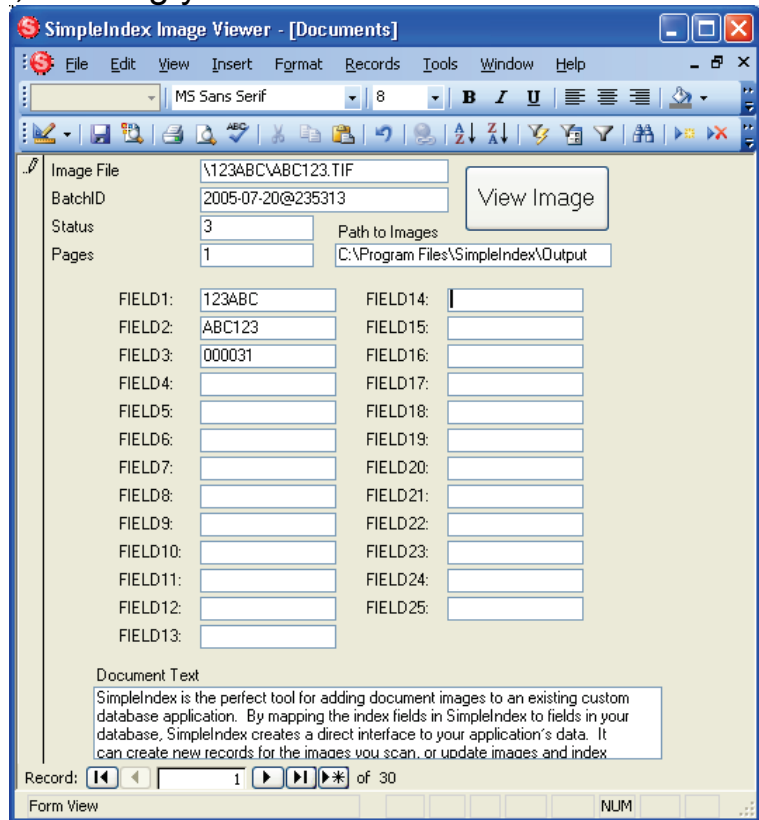
The SimpleExport add-on provides built-in exports to Digitech Systems PaperVision and CompuThink ViewWise document management systems, as well as a general method for formatting index data with XSLT that can be used to interface with any system. Please contact Simple Software to request a custom export script for any other document management system that cannot import files using the delimited text file output SimpleIndex provides.

2.4 Using a Database or Spreadsheet

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The index file that SimpleIndex provides can also be imported into a database (5.9) or spreadsheet, allowing you to create a search and retrieval interface for your documents that is simple, cost effective and tailored for your specific application. SimpleIndex can also be configured to interface directly with any database, eliminating the need to import the index files.

Using the *Blank Database Wizard* (5.9.2.1), anyone can create a generic database with built-in search and viewing functionality and connect it automatically to an existing SimpleIndex job. The result is a completely free document management system that anyone with Microsoft Office can use. Those familiar with Access may customize the forms in this database to display descriptive field names and hide unused fields.



The following spreadsheet was created by opening the index file in Excel and adding the column headings:

	A	B	C	D	E	F	G	H	I	J	K
	Doc Type	Client	Doc ID	Doc Date	Image File	Pages	Batch ID				
1	INVOICE	Doug Jacobsen	44	10/23/2003	c:\Output\INVOICE\Doug Jacobsen-44-2003-10-23.TIF	1	2003-10-30@001508				
2	INVOICE	Pretell Real Estate	46	10/26/2003	c:\Output\INVOICE\Doug Jacobsen-44-2003-10-23.TIF	1	2003-10-30@001508				
3	INVOICE	Pretell Real Estate	48	10/30/2003	c:\Output\INVOICE\Doug Jacobsen-44-2003-10-23.TIF	1	2003-10-30@001508				
4	INVOICE	Jenny Morgenthaler	35	9/15/2003	c:\Output\INVOICE\Jenny Morgenthaler-35-2003-09-15.TIF	1	2003-10-30@001508				
5	INVOICE	Dunn, Eric C.W.	36	9/22/2003	c:\Output\INVOICE\Dunn, Eric C.W.-36-2003-09-22.TIF	1	2003-10-30@001508				
6	INVOICE	Gordon Johnson	37	9/26/2003	c:\Output\INVOICE\Gordon Johnson-37-2003-09-26.TIF	1	2003-10-30@001508				
7	INVOICE	Brian K. Cook	49	10/30/2003	c:\Output\INVOICE\Brian K. Cook-49-2003-10-30.TIF	1	2003-10-30@001508				
8											
9											
10											
11											
12											
13											
14											

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The image file paths were automatically converted to hyperlinks by running this simple macro:

```
Sub ConvertToHyperlink()  
Dim oCell As Range  
For Each oCell In Selection  
    oCell.Font.Bold = True  
    ActiveSheet.Hyperlinks.Add Anchor:=oCell, Address:=oCell.Value, _  
        TextToDisplay:=oCell.Value  
Next  
End Sub
```

To use this macro, simply copy the code example into the Excel macro editor, select the cells in the Image File column and run the macro. Now users can simply click the cell and the image file will open in their default image viewer.

2.5 Custom Application Integration

SimpleIndex makes it easy to add document images to an existing custom database application. By mapping the index fields in SimpleIndex to fields in your database (5.9), SimpleIndex creates a direct interface to your application's data. It can create new records for the images you scan, or update images and index information in existing records. All of this can be done with your existing database, with the resulting images and index information made available immediately in your custom application.

The *Command Line Interface* (8) is another component that makes integrating SimpleIndex with custom applications so simple. All of the information you need to scan, process, organize and store documents is saved with the SimpleIndex configuration file. Using the *Command Line Interface*, your application can launch SimpleIndex, specify a configuration file and pre-set index field values, and have SimpleIndex automatically scan your documents, organize them and link them to your database without any user intervention whatsoever.

Since this is all implemented via the command line, it only takes the proper configuration file and a single line of code to integrate fully automated scanning in your application. Viewing documents can be done with another line of code that simply opens the current image file in SimpleIndex using SimpleSearch, or in the computer's default viewer like Windows Imaging or Adobe Acrobat. This design makes SimpleIndex by far the easiest way to add document imaging to a custom application.

2.6 Distributed Document Capture

2.6.1 Advantages of Distributed Capture

Distributed Document Capture is a key feature of SimpleIndex that can provide huge savings, fast turnaround and improved quality control for enterprise scanning applications. For large enterprises with many locations that need to capture and share data, Distributed Document Capture with SimpleIndex is an ideal solution.

To scan documents from many locations with a centralized solution, they must first be shipped to a scanning facility where dedicated personnel are required to process the large volume of paper. SimpleIndex makes it possible to scan these documents at their original location and send them electronically to a central database where they are made available throughout the enterprise. Other scanning software is too expensive and complex to make this kind of distributed capture practical.

The savings in shipping costs alone can justify the investment in distributed capture with SimpleIndex. Other advantages include faster turnaround, keeping the originals on-site, eliminating the need for dedicated scanning departments or costly outsourcing, and the ability to ensure the presence of required documents at the time they are collected using SimpleIndex's *Batch Auditing* (5.10.2.4) feature.

2.6.2 Implementation of Distributed Capture

To implement Distributed Document Capture with SimpleIndex, you must first carefully consider your existing network infrastructure to decide the best implementation method to use. Essentially, you are configuring SimpleIndex in the same way that you would in any of the other scenarios mentioned in this section, except with the extra step of transferring the images and index data to a central server. There are a wide variety of automated ways to transfer this data; the most common are FTP, email and simply copying the files over a VPN or other high-speed WAN interface.

If your WAN has a high-speed (128kbps+) connection to the central database server, it is practical to configure SimpleIndex's database functions to interface directly with the central database via the WAN. When saving images locally using a central database, the difference in performance is negligible. If your image files are small or your network connection is fast, it is also practical to use the central storage server as your *Output* folder (5.3.1.2) and transfer images automatically. This

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configuration is identical to how you would configure SimpleIndex with multiple scanners on the same LAN.

SimpleSend is part of the SimpleIndex Imaging Suite and gives you the ability to automatically transfer documents via secure FTP or email. It has a command line interface that allows it to be launched automatically when a batch of documents is released from SimpleIndex. It can also be scheduled to transfer that day's images at night. SimpleSend is the key to enabling distributed capture with SimpleIndex.

The ability to check for required documents while scanning is most commonly used in Distributed Document Capture scenarios. The *Batch Auditing* (5.10.2.4) feature allows you to define a list of values that represent required documents in a batch. If a scanned batch does not contain all the items in this list, the user is warned and given an opportunity to scan the file or enter a reason why the file could not be scanned at this time. This feature was implemented to allow a health care chain to ensure all the patient documents required to bill the insurance company were collected and scanned by the front desk operator, greatly improving their turnaround time and error rate for collections.

2.6.3 Centralized Administration of Job Configurations

SimpleIndex job configurations may be hosted on a website and launched via web links. This allows administrators to have a single version of all configuration files that can be updated without having to distribute local copies to many locations. A web portal can be created with links to all of the jobs relevant to the user, as well as processing instructions and other relevant information.

It is also possible to distribute global configuration settings and job files via download using the Global Settings Wizard (4.6.2). When SimpleIndex is launched for the first time, the wizard is displayed automatically. The user simply enters a URL provided by the administrator, and the settings wizard can download all the settings files, configuration scripts, scanner drivers and other support files required by your application and install them automatically.

3 Automating Document Capture

Once you have decided the best way to organize, store and retrieve your documents, the next part of the planning stage is to find the most efficient way to scan these documents and associate them with the correct index field values. Creating an efficient scanning and indexing process will save you countless hours of labor over the life of your project.

The two main methods for automating indexing are barcode recognition (5.5) and OCR – Optical Character Recognition (5.6). Barcode recognition is faster and more accurate, but your documents must contain a barcode on the document or a cover page for this to work. OCR is able to read printed data directly from the page, which means most documents can be processed as-is. However there are many conditions that can affect the practicality of OCR that is discussed in this section.

If your index data already exists in another database, SimpleIndex has two features that can make use of this data to automate processing. The *Index Autofill* feature (5.4.4) lets you enter one key field that is used in a database lookup to retrieve matching values and fill in the remaining index fields automatically. SimpleIndex also has the ability to pre-set index values using the *Command Line Interface* (8) and have a scanned document receive these indexes automatically.

3.1 Using Barcode Recognition

Barcode recognition (5.5) is the most efficient way to capture index data printed on documents. Some documents already have key information in barcode format on them. If your project is to scan new documents on an ongoing basis, it may be possible for you to redesign the forms to include barcodes. Having a barcode with index data on the document is the best case scenario, since all the index data is on the document at the time it is created in a format that can be read with near 100% accuracy.

If it is not possible to print barcodes on the document itself, an alternative is to have the person who creates the document print a barcode cover page and place it on the file before it is scanned. The *SimpleCoversheet* application was designed to make this easy by providing a simple interface for selecting index values and printing a standard coversheet that contains these values in barcode format.

Barcode recognition can also be useful when you have documents with a variable number of pages that will all receive the same index values. If it is

not possible to generate an indexed coversheet for these at the time they are created, a generic barcode coversheet can be used to separate the scanned images into multi-page files, one for each document. A second process can then be used to index these images one file at a time instead of one page at a time, greatly increasing throughput.

3.2 Using OCR

Zone OCR (5.6) solutions traditionally require you to specify a region on the page where index information is found. This region is recognized and the result is inserted into an index field. The problem with traditional zone OCR is that if the region is moved slightly due to variations in scanning, the result could contain extra neighboring characters or cut off desired characters. This limits the usefulness of traditional zone OCR to documents where the index value is in the exact same place every time and has plenty of white space around it.

SimpleIndex's OCR contains many advanced features to overcome the inherent limitations of zone OCR. This is done by providing template and dictionary matching for OCR fields. These features search the OCR results for a certain pattern or list of possible values and return only the matching data. This allows you to draw your OCR zones much larger than normal, ensuring that no matter how much the data shifts around it will always be contained within that region.

It is even possible to draw your zone around the entire page and find key information that is not printed in any fixed location. For example, a doctor's office may receive lab reports from many different labs. Each report is formatted differently, but each contains the patient's name somewhere on it. Using the dictionary matching feature with a patient name list, SimpleIndex can identify the correct patient for each lab automatically.

When implementing OCR for document automation, carefully consider the data you are trying to recognize. Is the text legible? Does it appear in a fixed location? Does it conform to a unique pattern that won't be found anywhere else on the page? Is there a list available with all the possible values for this field? Answer these questions and you will know which OCR approach is best for your application.

3.3 Using Index Autofill

The *Autofill* feature (5.4.4) of SimpleIndex is an easy way to associate many index fields with one document without retyping data that already exists in another application. *Autofill* uses a database lookup to retrieve

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records that match a key value entered by the user. Blank index fields are then filled in automatically with the data from this lookup. The result is a document database with many different possible search fields, of which only one needed to be entered during scanning.

The key field may be typed by the user or it may be read from the document automatically using barcode recognition or OCR. The lookup is performed either when the user changes this field or when the index values are saved. If the lookup finds multiple matching records, the user is notified and the first set of values is used by default.

3.4 Using Pre-Indexed Batches

Pre-index batches (5.4.1) are a unique feature of SimpleIndex that greatly improve throughput for scanning a single document at a time. Pre-indexed batches can be configured to allow the user to enter index values prior to scanning or they can be executed from the command line to circumvent user interaction altogether.

The pre-index batch option must be selected to enable unattended processing (8.3).

Some typical scenarios for pre-indexed batches are:

1. SimpleCoversheet or another barcode application is used to automate indexing. Scanning is done on an MFP and SimpleIndex runs automatically on a processing workstation to read the barcodes and export the renamed images.
2. User scans one document at a time by entering field values first, scanning and having all the images saved with these values automatically.
3. User has several pre-defined documents that they must scan. All field values are generated automatically or saved with the configuration file. User loads the scanner and double-clicks the appropriate configuration to scan and save that file automatically.
4. SimpleIndex is integrated with an existing application. A "Scan Current Record" button is implemented that launches SimpleIndex and passes the index values for the current document through the command line. The user loads the scanner and clicks this button; images are scanned and saved automatically.

4 Installing SimpleIndex

4.1 Running the SimpleIndex Installer Wizard



Double-click the downloaded setup file to launch the SimpleIndex Installer. Follow the instructions in the wizard to install SimpleIndex.

4.2 Installed Components

The SimpleIndex Imaging Suite installs five applications that work together to form a complete solution for a wide variety of scanning environments. These are:

- SimpleIndex* - main scanning, indexing application
- SimpleCoversheet* - barcode coversheet printing application
- SimpleSend* - secure FTP and E-Mail sender for document routing
- SimpleQC* - Fast thumbnail viewer for quality control & rescan
- SimpleSearch* – Search-only mode for finding and viewing files
- SimpleExport* - converts index data to XML and other formats

SimpleSend, SimpleCoversheet and SimpleExport use the Microsoft .NET 2.0 platform. .NET is also required to use the server processing and file property manipulation features in SimpleIndex. This is downloaded and installed automatically if it is not present on your system. Installation of .NET requires an Internet connection. If the scanning workstation does not have an Internet connection, you may download the .NET setup files from:

<http://www.microsoft.com/downloads/details.aspx?familyid=0856each-4362-4b0d-8edd-aab15c5e04f5>

Imaging components are required only by SimpleIndex and SimpleQC and can be deselected for standalone installations of SimpleSend or SimpleCoversheet.

The following applications are optional. They are used only to view specific types of documents:

- Adobe Acrobat Reader (PDF viewing)
- Adobe Acrobat Standard/Pro (PDF editing, digital signatures, etc.)
- Microsoft Office (MS Office viewing or Office to PDF conversion)
- OpenOffice (Office to PDF conversion without MS Office)
- Microsoft Internet Explorer (HTML, XML & PDF viewing)

4.3 Upgrading from Previous Versions

If upgrading from version 6.1 or previous, you must first uninstall the Imaging for Windows OCX Controls from Add/Remove Programs in your Control Panel before upgrading.

Users with version 5.1 or previous must uninstall the existing version before upgrading.

Major upgrades (like version 6.x to 7.x) will require re-activation of your SimpleIndex license. Please contact your SimpleIndex dealer to verify the status of your maintenance and obtain a new serial number before upgrading.

4.4 Uninstall Notes

The uninstall procedure does not delete any license files created in the SimpleIndex folder. If you do not plan to reinstall SimpleIndex, you must delete the CommonApplicationData\Simple Software folder to completely remove SimpleIndex. This folder can be found under c:\Documents and Settings\All Users\Application Data on Windows XP systems, and c:\ProgramData in Windows Vista or above.

Microsoft .NET 2.0 shows up as a separate item in Add/Remove Programs and must be uninstalled separately.

Versions 6.1 and older required a separate uninstall of Imaging for Windows OCX Controls from Add/Remove Programs. It is recommended you uninstall this item before upgrading to 7.

4.5 Windows Vista/7/2008 Support

The SimpleIndex 7 installer is designed to be fully compatible with Windows Vista, 7 and Server 2008, as well as previous versions like XP and Server 2003. The SimpleIndex server processing module has also been updated to be compatible with all Windows operating systems.

4.6 Running SimpleIndex for the first time

The first time you run SimpleIndex, the *Global Settings Wizard* is displayed. From this wizard you can download configurations from a website, set default configuration folders and security options.

4.6.1 Setup Type

Most of the options configured by setup wizard are specialized security options that are not required in most environments. Select *Configure Advanced Settings* to set export policies and administrator passwords. Select *Use Default Settings* to set these options to their defaults (no admin password, all exports enabled). Select *Download Automatic Configuration* to download and configure settings automatically.



4.6.2 Download Automatic Configuration

This option allows administrators to bundle several configuration files and related dictionaries and databases together and download them automatically when installing SimpleIndex. The files should be in a Zip archive and is extracted to the Config folder defined below.

The zip file can also contain a batch file called “Config.bat”, “Config.exe” or “Config.vbs” that is launched automatically if present. This file can perform a wide variety of tasks:

- Automatically set all default folders and security options via the registry
- Copy list files, databases and other supporting files to default locations
- Download and install scanner drivers

- Install other supporting applications like image conversion tools

Registry Keys set by the Global Settings Wizard are below. Options set by check boxes are “1” or “0”; other settings are the full path to a folder.

“HKLM” is short for “HKEY_LOCAL_MACHINE”

HKLM\Software\SimpleIndex\DefaultFolders\Config
HKLM\Software\SimpleIndex\DefaultFolders\Input
HKLM\Software\SimpleIndex\DefaultFolders\Output
HKLM\Software\SimpleIndex\DefaultFolders\Log
HKLM\Software\SimpleIndex\DefaultFolders\Backup
HKLM\Software\SimpleIndex\DefaultFolders>ShowOpen
HKLM\Software\SimpleIndex\Security\AdminPW
HKLM\Software\SimpleIndex\Security\DisableSend
HKLM\Software\SimpleIndex\Security\MakePermenant

4.6.3 Basic Configuration Settings

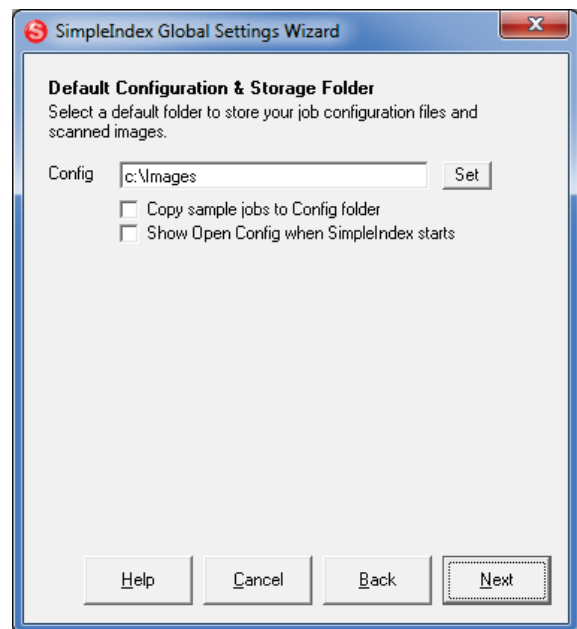
This screen is the only one shown when *Use Default Settings* is selected. The following options are available on this screen:

4.6.3.1 Default Configuration Folder

This folder is shown automatically anytime you open or save a configuration. It is recommended you put all of your job configuration files, lists and other files required by your jobs in this folder or in subfolders of this folder.

4.6.3.2 Copy sample jobs to Config folder

Selecting this option will copy several sample job files, complete with sample images, list files and databases, to your default Config folder. These jobs demonstrate many of the core features of SimpleIndex. It is highly recommended that you install the sample job files and use them to learn how SimpleIndex processes documents with OCR and barcode recognition, and how to configure settings to perform these tasks. They are configured to use *Relative Paths* (4.6.4.1) to ensure they work no matter where your default folder is set.



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Many of the samples are numbered to indicate that they should be run in that order, since the processing done in Step 1 provides the documents that are searched in Step 2.

Sample Job	Description
Document Sorting\1 – Read My Documents.sic (Requires MS Office)	Uses text from MS Office documents and automatically indexes files with pattern matching. Exports index data to Document Sorting.mdb
Document Sorting\2 – Search My Documents.sic (Requires MS Office)	Search and view documents exported to Document Sorting.mdb in step 1.
Invoice Processing\A – Read Invoices with Zone OCR.sic	Uses Zone OCR to locate index data and pattern matching to remove extra data from the zone, leaving only the desired index value.
Invoice Processing\B1 – Read Invoices with Barcodes.sic	Uses barcode recognition to capture 2 barcodes and pattern matching to match the values to the appropriate index fields. Runs in 1-click processing mode. Exports index data to Barcode Invoices.mdb.
Invoice Processing\B2 – Search Invoices from Barcode.sic	Search and view documents exported to Barcode Invoices.mdb.
Invoice Processing\C1 – Read Invoices from PDF.sic (Requires Adobe Acrobat)	Uses text from PDF documents and automatically indexes files with pattern matching. Exports index data to PDF Invoices.mdb.
D1 – Read Invoices with Full-Page OCR.sic	Uses full-page OCR to create a full-text index of documents, along with pattern matching to extract index data from the full page text. Runs in 1-click processing mode. Exports index data to Full-Text OCR Invoices.mdb. Fields that are not matched are given the value “MISSING”.
D2 – Update Invoices from Full-Page OCR.sic	Searches results from step 1 for the value “MISSING” to locate OCR errors. Updates record in Full-Text OCR Invoices.mdb with new value entered by user.
D3 – Search Invoices from Full-Page OCR.sic	Search and view all documents exported to Full-Text OCR Invoices.mdb.

4.6.3.3 Show Open Config when SimpleIndex starts

Select this option to display the *Open* dialog automatically when you run SimpleIndex. This lets you quickly select a job file to run, saving you the extra step of having to click the *Open* button.

4.6.4 Advanced Settings

The following settings are displayed when you select the *Configure Advanced Settings* option.

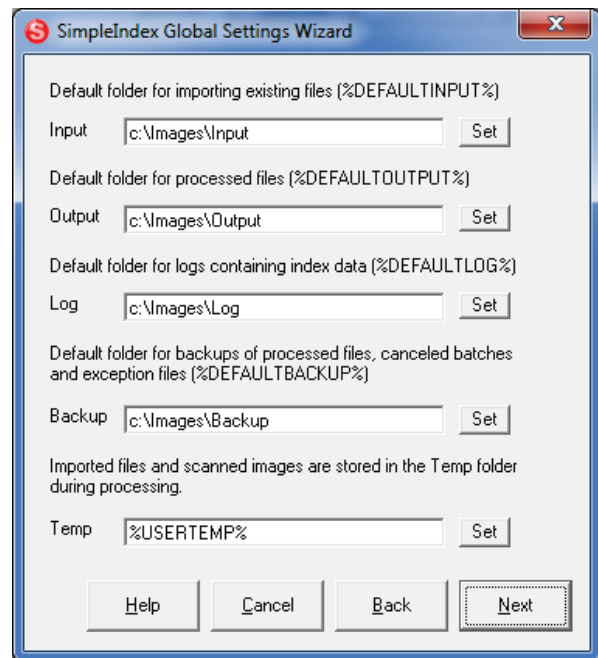
4.6.4.1 Default Folders

The default folder settings are used when creating new SimpleIndex configurations. They allow you to create job files that work on computers with different folder structures and to move configurations and image files without having to update multiple job files.

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In any of the settings that use a file path you may use special keywords like %CONFIGFILEFOLDER% in place of the actual path.

- Config – folder for storing configuration files
%DEFAULTCONFIG%
- Input – source for processing files
%DEFAULTINPUT%
- Output – destination for processed images
%DEFAULTOUTPUT%
- Log – destination for index and batch logs
%DEFAULTLOG%
- Backup – destination for files with invalid formats, aborted batches and backups of input files
%DEFAULTBACKUP%
- Use the path to the configuration file with %CONFIGFILEFOLDER%
- Temp



4.6.4.2 Admin Password

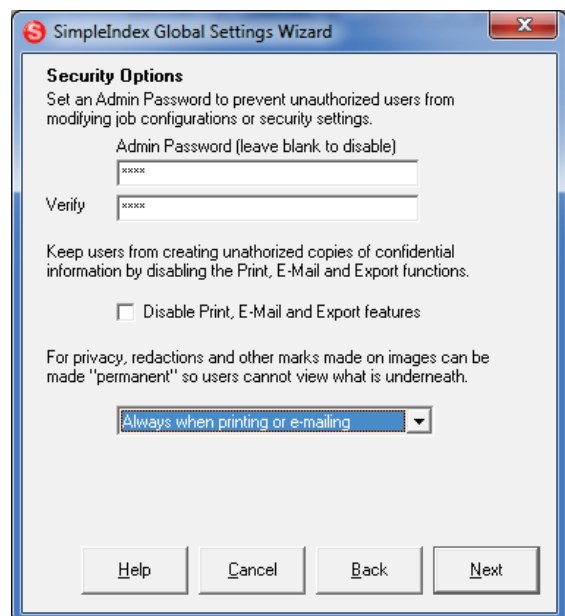
Set this option to force the user to login with this password before accessing the configuration settings. This prevents users from accidentally changing configuration options.

4.6.4.3 Disable Print, E-Mail and Export features

Check this option to disable features that allow users to reproduce documents outside of SimpleIndex. Use this for extra security and access control.

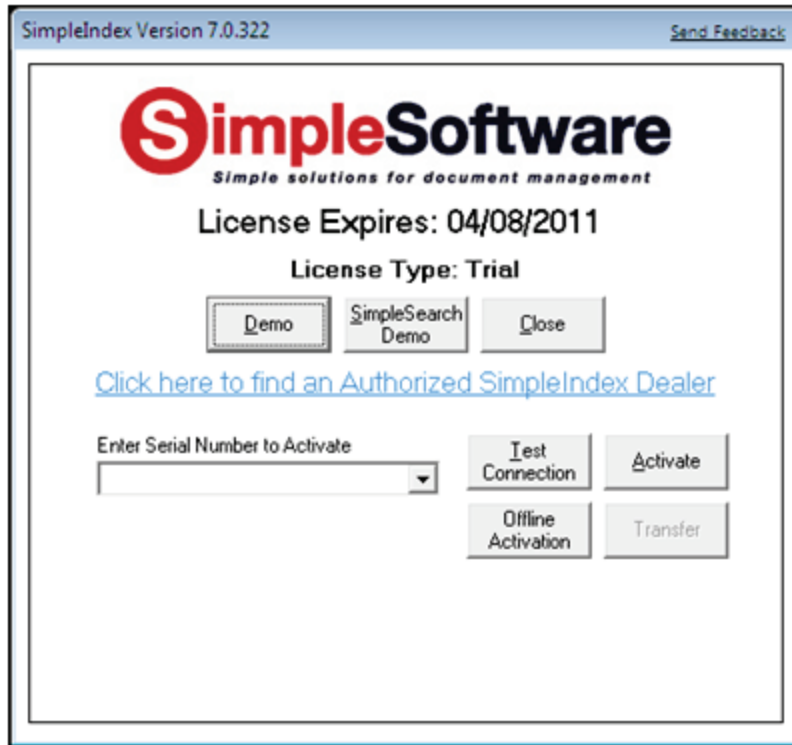
4.6.4.4 Annotation Privacy Settings

This option lets you select when to “burn in” annotations automatically, which makes the annotation a permanent part of the image and prevents users from viewing the data underneath. This is typically used for redaction of private information. Options are to always make annotations permanent, only when printing or emailing documents or never.



4.7 Demo/Registration Screen

When SimpleIndex is first installed, it is automatically set to run in *Demo Mode*, with the expiration date set to 30 days after you first run the program. *Demo Mode* can run as SimpleIndex Full with all optional features enabled, or it can emulate the SimpleSearch view-only license clicking the appropriate button. You must restart SimpleIndex to switch between modes.



To register SimpleIndex, enter your serial number in the box and click *Activate*. If you are connected to the Internet and no firewall is blocking it, SimpleIndex will connect to the activation server and register automatically. If connectivity problems prevent communication with the activation server, you may activate offline by clicking the *Offline Activation* button and following the instructions.

5 Job Options

5.1 Overview – How to Setup SimpleIndex Jobs






There are many options in SimpleIndex to perform a wide variety of imaging tasks. This overview will help you learn the steps involved in setting up jobs so that you can go directly to those settings that apply to your project.

SimpleIndex comes with several example job configurations that demonstrate the configuration of most features. When configuring your first SimpleIndex job, you should open the sample job that is most similar to your own and use it as a starting point.

5.1.1 Processing Stages

SimpleIndex is designed to process documents in the following stages, starting when the user clicks the *Run Job* button.



1. **Import images** from the *Input* folder (5.3.1.1) or scan new images (5.3.4.1). 
 2. **Process images**, performing PDF Processing (5.3.4.7) Auto-rotate (5.3.3.3), OCR (5.6), Barcode Recognition (5.5), Despeckle (5.3.3.2) and Deskew (5.3.3.1). 
 3. **Manually review images and index values** from OCR and Barcode Recognition. Manually enter index values that are not populated automatically. 
 4. **Audit the batch** (optional) to ensure all required documents are present and all index information is entered correctly (5.10.2.4).
 5. **Export the images and index information** to the *Output* folder (5.3.1.2). Subfolders (5.4.3.5) and filenames (5.4.3.6) are determined by the index options you select. If enabled, *Insert* mode (5.9.3.2) will create records in your database and populate them with the index values from this batch. 
- Index, batch and audit log files (5.8) are written to the Log folder and log files/database records are created. 

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SimpleIndex is unique because it performs all the enabled stages sequentially without user intervention. Other programs require a separate command to initiate each step, slowing productivity in single-workstation environments. When you click the *Run Job* (7.3.5) button, SimpleIndex scans, processes and exports the images automatically according to your configuration settings.

An even greater degree of automation can be achieved if all of the index values can be automated through *Barcodes* (5.5), *OCR* (5.6) or the *Command Line Interface* (8). Using *Pre-Indexed* (5.4.1) batches you can skip step 3 and perform scanning, processing and export without any user intervention whatsoever. This allows you to run SimpleIndex by just double-clicking the job file, or by launching it from another program.

When configuring SimpleIndex keep these stages in mind and think about what your particular job requires at each step. This will help you make sense of the many options available to you.

5.1.2 File Naming Schemes

SimpleIndex's file naming parameters allow you to organize scanned documents logically using folders (5.4.3.5) and filenames (5.4.3.6), making it easy for users to find the file they need using Windows Explorer. File naming conventions also allow you to link images to existing database records by assuming images are saved with a specific folder and filename, eliminating the need for data imports.

File naming conventions are how SimpleIndex combines pages in a multi-page document into a single file. If you are used to other document management applications this may be a different way of doing things. SimpleIndex considers any set of images that have the same index values a single document. At the end of the job, the export file is determined by the index values and similar images are combined into a multi-page file. This simplifies the indexing process and makes it possible for pages in a single document to occur non-consecutively in a batch. This also makes it possible to append pages to previously scanned documents at a later date.

Each index field you define has the option to be used as a folder level or filename. When exporting, SimpleIndex goes through the index fields in order, creating folders for each field

Type	Name	Template	Required	Folder	Filename	Forward
1	OCR Account #		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	OCR Order #		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	OCR Company		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	OCR Customer Ord		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	OCR Sales Person		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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where *Folder* is checked, and creating the filename by linking the index values that have *Filename* checked. For the pictured example, if the *Output* folder is “c:\output” and the *Field Separator* is “-“ the files would be named:

c:\output\Account #\Order #-Company-Customer Order #-Sales Person.tif.

5.1.3 Linking Jobs

Many scanning tasks are better performed in separate stages. For example, a large scanning operation may need several scanners and indexers working together. This can be accomplished by configuring the scanners to scan images to an intermediate folder, and the indexers pull files from that folder, index them and produce the final output. Using this technique, a wide variety of imaging tasks can be accomplished.

The database features are also useful in linking jobs. *Insert* mode (5.9.3.2) can be used by scanning workstations to create new records, and *Update* mode (5.9.3.3) can be used by unattended barcode/OCR processes and finally by indexers to review and correct the index information.

Finally, the *PreProc* and *PostProc* options (5.3.2) allows you to run any program from a command line automatically at the beginning or end of each batch. This is perfect for converting input files or performing post-processes on the output files to transform them to any format you need. You can also use it to initiate a database import or FTP upload. Since you may launch any application, there is no limit to the possibilities.

5.2 Job Settings Wizard

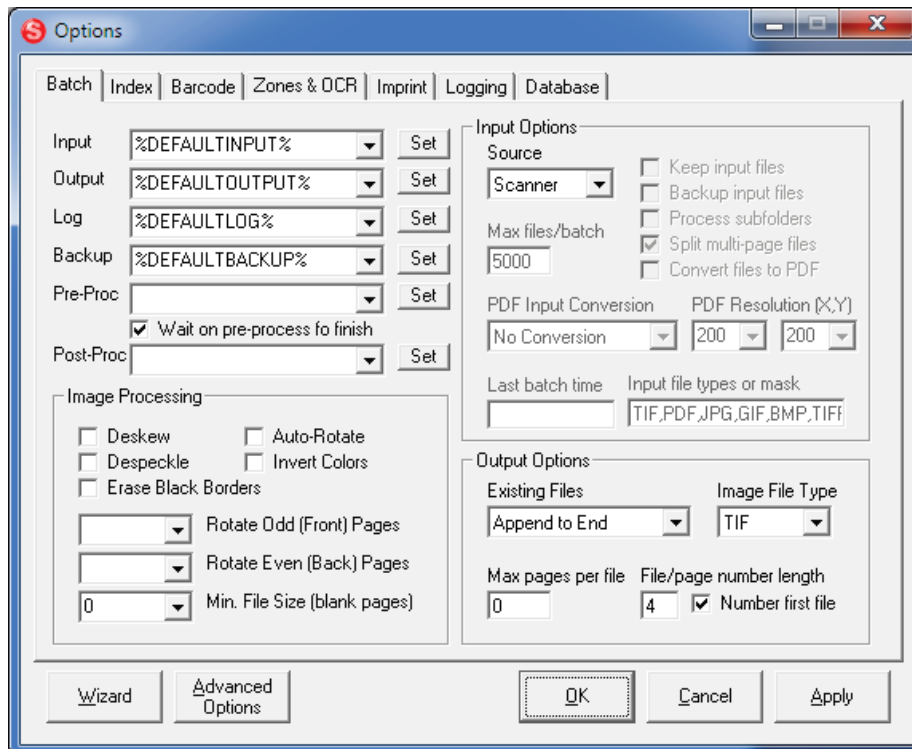
The *Job Settings Wizard* is displayed when you create a new job configuration. You can also access the wizard from the *File* menu, or the *Wizard* button on the *Job Options* screen.

The wizard guides you through the process of creating a job configuration file step by step. Each option has a detailed description describing its function. Only the most common options are displayed on the wizard—other options must be configured from the *Job Options* screen.

All of the options in the wizard correspond to options on the *Job Options* screen. Detailed descriptions in the manual are listed under the corresponding option there.

5.3 Batch Options

The Batch tab contains general batch settings such as import and export file locations, file format conversion and clean-up functions like Deskew, Despeckle, automatic rotation and blank page deletion.



5.3.1 Folder Settings

In the folder settings on this screen and any setting that uses a file path, the keywords %DEFAULTINPUT%, %DEFAULTOUTPUT%, %DEFAULTLOG%, %DEFAULTBACKUP% and %DEFAULTCONFIG% are substituted for the corresponding default folders entered in the *Global Settings Wizard* (7.4.1.14).

5.3.1.1 Input Folder

This is the source folder when processing existing images.

5.3.1.2 Output Folder

After processing, the images are moved or copied to the *Output* folder and the appropriate subfolders are created.

5.3.1.3 Log Folder

All log files (5.8) are stored in this folder. Log files contain index information associated with processed documents as well as batch information for productivity tracking.

5.3.1.4 Backup Folder

The Backup folder is used to ensure that any files that cannot be processed by SimpleIndex are preserved. There are several scenarios where this may be necessary:

- Input files with invalid or unsupported formats
- Batches that must be canceled due to invalid settings, lost database connection, etc.
- Creates a full backup of all processed files

When the *Backup* folder option is set, unsupported files and canceled batches are copied to this folder. Subfolders are created automatically using the *Batch ID* for the current batch. All processed files are copied when the *Backup Input Files* option is selected.

Leave the *Backup* folder blank or set it to “DELETE” and all invalid files and canceled batches are deleted automatically.

It is important to periodically delete unneeded files from the backup folder to prevent it from growing too large.

5.3.2 Pre-Process and Post-Process

PreProc runs a program from the command line at the beginning of each batch. *PostProc* runs a program from the command line at the end of each batch. You can enter any valid command line to launch another application, or the path to a SimpleIndex configuration file to run multiple jobs in sequence.

The *Wait on pre-process to finish* option will cause SimpleIndex to wait for the program to exit before beginning the batch. Uncheck this option to keep the program open during processing, which is useful for displaying operator instructions or launching support applications.

Several optional variables are available to allow you to pass batch information to the program you are running. When these variables are inserted in your command line, they are automatically replaced with the values they represent when the command line is executed.

- %IDXFILE% - full path of the index file generated for this batch
- %BATCHNAME% - the unique ID for this batch, in the format YYYY-MM-DD@HHMMSS
- %OUTPUTFOLDER% - the location of the images for this batch
- %USERID% - the name of the user logged in to SimpleIndex
- %PASSWORD% - the password entered in the SimpleIndex logon screen
- %FIELD#% - where # is the number of a valid field, substitutes the value of this field that was assigned to the first image in the batch

5.3.3 Image Processing

Several options are available to fix common problems with document images to make them easier to read by humans and computers alike. Barcode and Full licenses include an enhanced image processing engine that is much faster and produces significantly better quality images.

5.3.3.1 Deskew

Straightens the page correcting any skew that might have occurred during scanning.

5.3.3.2 Despeckle

Cleans the image, removing stray pixels and marks. The enhanced despeckle included with the Full version will also remove shaded backgrounds from images.

5.3.3.3 Erase Black Borders

Removes black borders around the edge of the page that some scanners produce. Only works with black and white TIFF images.

5.3.3.4 Auto-Rotate

Checking this option will cause SimpleIndex to attempt to detect the proper page orientation and rotate the image automatically to this position.

This option only works with black and white TIFF images.

Automatic rotation uses a “best guess” algorithm to determine the page layout. This works very well with text documents, but accuracy decreases the more tables, handwriting and pictures you have on the page. It should not be expected to work 100% of the time.

5.3.3.5 Invert Colors

Reverse the colors in the image automatically. This will switch Black with White on B&W images, or create a “negative” image for color.

5.3.3.6 Rotate Odd (Front) Pages

Rotates odd pages the selected number of degrees clockwise. Separate values for even and odd pages allow front and back pages to be rotated independently.

5.3.3.7 Rotate Even (Back) Pages

Rotates even pages the selected number of degrees clockwise. Separate values for even and odd pages allow front and back pages to be rotated independently.

5.3.3.8 Minimum File Size

Set this option to automatically delete blank pages by removing any files smaller than the value specified here (in Bytes). A good setting for this value (with 200dpi, B&W images) is 2000, but this can be adjusted to meet the specifics of your scanning environment. This option is good for scanning mixed batches of single and double-sided pages and removing the blanks automatically. A value for this field is required for the blank page *Autonumber* (5.4.6.1) and *OCR* (5.6.4.1) features to work.

5.3.4 Input Options

5.3.4.1 Source

Select whether you want to input files from the Scanner or use existing images in the *Input* folder. To scan files with SimpleIndex, select Scanner

as your source and scanning will take place automatically when the batch job is run.

5.3.4.2 Max files/batch

This option determines the maximum number of image files that will be used to determine a batch. In *Update* (5.9.3.3) and *Retrieval* modes (5.9.3.4), this value should be set to prevent users from retrieving too many records at once, which can impact performance.

This feature is also useful when using SimpleIndex to index many files from a large *Input* folder. Processing more than 1,000 pages in a single batch is not recommended. Set to 0 (default) for unlimited.

5.3.4.3 Keep input files

Select this option to keep all of the original files in the input folder instead of removing them as they are processed. This option is useful when testing configuration settings, as well as for re-organizing documents while leaving the originals intact. This option is also necessary to prevent errors when the *Input* folder is read-only.

When using the *Last batch time* (5.3.4.10) setting, it is possible to process only new files added to the *Input* folder since the last batch. Without this option selected, all files in the folder are processed in every batch.

5.3.4.4 Backup input files

When checked, all files are automatically copied to the *Backup* folder (5.3.4.4) before they are processed. Subfolders are created automatically in the *Backup* folder using the Batch ID (the current date/time formatted as YYYY-MM-DD@HHMMSS).

5.3.4.5 Process subfolders

All subfolders of the *Input* folder are processed automatically when this option is checked. Each folder is processed in its own batch until all folders have been processed. Not available when scanning.

5.3.4.6 Split multi-page input files

When processing multi-page input files, each file is treated as a single document with a single index value by default. Checking this option causes SimpleIndex to split multi-page files into single images that must be indexed individually.

5.3.4.7 Convert files to PDF

Converts all MS Office, HTML, XML, text and image files in the Input folder to PDF before processing. Files are converted and saved in the Input folder before the import step. If *Keep Input Files* is unchecked, the original files are deleted following conversion. To avoid having both copies of a file imported after conversion, use the *Input File Types* option.

This option requires MS Office 2003 or above or OpenOffice 3 or above to work. OpenOffice is available for free at OpenOffice.org.

5.3.4.8 PDF Conversion

In order to perform some operations on PDF files, they must first be converted to TIFF images. SimpleIndex will automatically convert PDF to TIFF for OMR and barcode recognition on-the-fly. However, for image-only PDFs, it is much faster to have the embedded images “extracted” from the PDF. The TIFF images can be converted back to PDF without loss of quality or data by setting the *Image File Type* option to PDF.

With all PDF conversion options, the PDF X and Y Resolution settings are used to determine the output resolution of the TIFF image. The *Split multi-page input files* option will determine whether imported PDF or TIFF files are single or multi-page.

5.3.4.8.1 No Conversion

PDF Files are left as-is. If *Split multi-page input files* is selected then PDFs are split into single page PDFs. OCR and barcode functions will automatically convert the PDF to TIFF on-the-fly for recognition using the slower *Convert to B&W TIFF* method, keeping the original.

5.3.4.8.2 Save Embedded Images

This is the preferred method. Image-only PDF files will have embedded images saved to TIFF image files. Color is automatically detected. Text-based PDFs are converted to TIFF using the *Convert to B&W TIFF* method. Detection of text versus image PDFs may not be exact.

The PDF X and Y resolution must be set to match the original scan resolution of the embedded images to get the correct TIFF image dimensions.

5.3.4.8.3 Convert to B&W TIFF

PDF files are converted to black and white TIFF images. Text-based PDFs will have text rendered as images, preserving the document image.

5.3.4.8.4 *Convert to Color TIFF*

Same as above only renders image as a color TIFF with LZW compression. Not recommended for OCR and barcode recognition.

5.3.4.9 **PDF Resolution (X,Y)**

When converting PDF to TIFF, these settings indicate the output resolution of the TIFF image. The first indicates the X or horizontal DPI (dots per inch) setting. The second indicates the Y or vertical DPI.

When saving embedded images from a PDF file, a default resolution of 200dpi is assumed for images found in the PDF files. Use these settings to override the X and Y resolution settings when extracting PDF images. If these settings do not match the originals, output images will show incorrect page dimensions.

5.3.4.10 **Last batch time**

Use this setting to process files that have been created or modified since the date and time entered. This is useful when you want to keep the original files in the *Input* folder and process new files as they are added or changed. The *Keep input files* (5.3.4.3) option must also be selected to enable this.

On the *Index* tab, you must select *Reset seed value after batch* (5.4.6.3) in order to update the *Last batch time* after each batch and save it to your configuration file. You will be prompted to enable this setting automatically if it is not set. If the setting is not saved after each batch, the same date and time is used for every batch.

5.3.4.11 **Input file types or mask**

This field lets you filter the input folder for specific file name patterns or types. This can be a simple list of file extensions to process all files of each types, or it can be a file mask such as *a*.tif* or **MISSING**.

TIF, JPG, GIF and BMP images may be processed as images. PDF, DOC, XLS, PPT and other files may be processed, and viewed in SimpleIndex if the appropriate software is installed on the computer. Movie and Audio files are played automatically in the SimpleIndex media player. Any OLE-enabled application may be processed with SimpleIndex as long as its viewer is installed. Non-OLE file types may be opened automatically in their default viewer.

To automatically process all files, enter *** in this field.

To set the file types, simply list all the extensions for the types of files you want to process. Enter a Pipe “|” character, and all the extensions following it will open automatically in their default viewer. For example:

```
TIF,PDF,DOC,XLS|ZIP,MP3,AVI
```

This setting will process TIF, PDF, Word and Excel files in SimpleIndex, and automatically open Zip, MP3 and AVI files in their default application when they are viewed in SimpleIndex.

Standard file masks may also be used. Separate multiple masks with a semicolon. TXT files are ignored by default unless you add *.txt to the list of masks.

```
a*.tif;b??c*.pdf;*MISSING*;*.txt
```

5.3.5 Output Options

5.3.5.1 Existing Files

When a file exists in the output folder, there are several options for how this are handled by SimpleIndex. The *Append* options apply only to multi-page TIFF and PDF files. All other file types are named according to the settings described under *Numbered 1-Page Files*, unless *Replace Existing Files* is selected and existing files are overwritten.

5.3.5.1.1 Numbered 1-Page Files

Using this option, only single-page files are created and the page number is added to the filename for any subsequent pages with the same output filename. Use the *File/page number length* (5.3.5.4), *Number first file* (5.3.5.5) and *Field Separator* (5.4.5.6) settings to format the file numbering scheme.

Here are 2 sample settings for the page numbering and the resulting filenames (assuming TIF images):

File/page number length: 4

Number first file: On

Field separator: -

Page 1: Filename-0001.tif

Page 2: Filename-0002.tif

Page 3: Filename-0003.tif

File/page number length: 6

Number first file: Off

Field separator: =

Page 1: Filename.tif

Page 2: Filename=000002.tif

Page 3: Filename=000003.tif

Typically you would turn *Number first file* off when you expect most files to have only 1 page and only need to account for the occasional duplicate.

5.3.5.1.2 Append to End

Use this setting to add new pages to the end of existing files. These are added in the order they appear in the batch. This is the default setting for creating multi-page files from individual pages in a batch.

5.3.5.1.3 Append to Start

Use this setting to add pages to the beginning of existing file. If a batch has multiple files with the same output filename, these pages will appear in the same order they appear in the batch.

5.3.5.1.4 Replace Existing Files

This setting will replace any existing files with the file from the current batch. The user is not prompted—the file is overwritten automatically. If multiple TIFF or PDF files from a batch have the same filename they are combined into a multi-page file before overwriting the existing file.

5.3.5.2 Image File Type

Select the file type you would like images to be saved in, either TIFF (default), PDF, PDF/A or JPEG. JPEG does not support multi-page files. Non-image files are saved in their original format and are not affected by this setting.

5.3.5.3 Max pages per file

This option allows you to set a fixed number of pages for each file. This can be used to automatically split files that have a fixed number of pages or to break up very large files into several smaller ones.

When used with the *Forward* (5.4.3.7) option, this setting limits the number of files that index values are carried forward. For example, a setting of 2 would allow you to read index information from the front page of a

document, have it automatically apply to the back page, but not to the following page.

This option may also be used with *Autonumber* (5.4.6) fields to automatically increment the number every X pages.

5.3.5.4 File/page number length

Use this setting to change the number of leading zeros in the file numbering scheme.

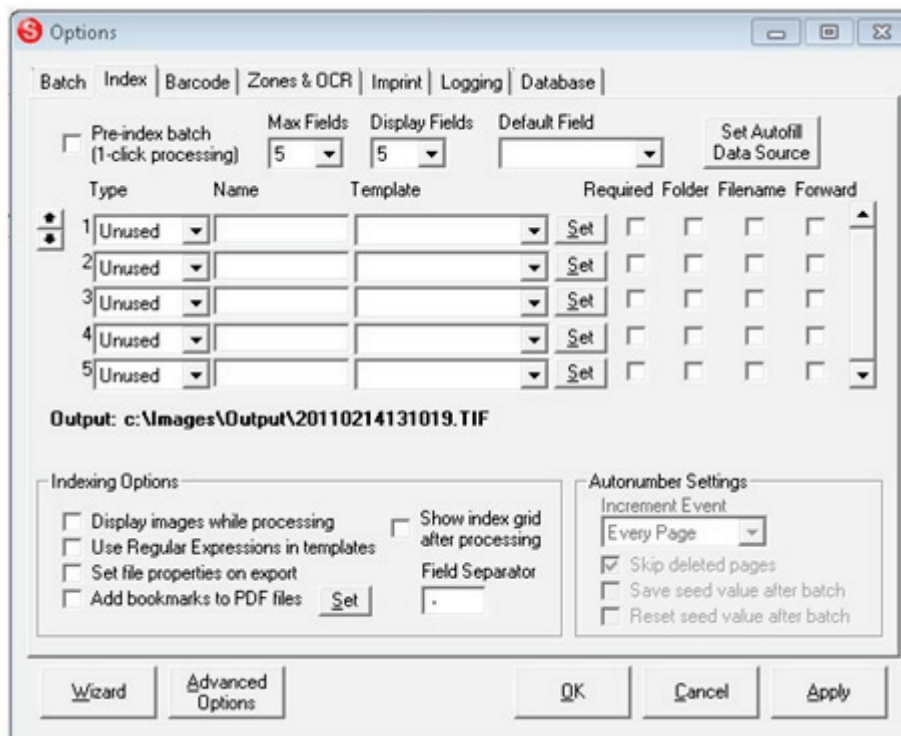
This setting is used with the *Numbered 1-Page Files* (5.3.5.1.1) option and with any file that is not a TIFF or PDF.

5.3.5.5 Number first file

When scanning single-page documents, the -0001 after each file is usually unwanted. Uncheck this option to disable the number on this first page.

This setting is used with the *Numbered 1-Page Files* (5.3.5.1.1) option and with any file that is not a TIFF or PDF.

5.4 Index Options



The *Index* tab contains settings for labeling documents with index fields and using those values to create standardized folder and file naming schemes.

The order of the index fields is used to determine how subfolders and filenames are generated. To change the position of an index field, double-click the field number on the left.

5.4.1 Pre-Index Batch

When this option is checked, the user enters the *Index* fields before scanning, and these values are applied to all scanned images. This improves throughput for *Single-Index* batches and allows for completely automatic processing from the command line (8).

5.4.2 Number of Fields

By default, SimpleIndex has 5 fields that can be configured as index fields or marked as “Unused” to leave disabled. If your job requires more than 5 index fields, you must configure the following settings.

5.4.2.1 Max Fields

If you need to have more than 5 fields, enter the total number of fields here.

5.4.2.2 Display Fields

This is the number of fields to display at one time. The scroll bar must be used to view fields above this number. Unless the screen resolution is very high, a maximum of 7-8 fields can be displayed before some options become obscured.

When you have many index fields, it may be useful to group them logically so that related fields are displayed on the screen at the same time. Field grouping is accomplished by setting *Display Fields* to the number of fields in the largest group, and using *Unused* field types for extra fields on each page.

5.4.2.3 Default Field

The field selected in this option is highlighted whenever a new image is displayed. If every field does not change with every image, selecting the field that changes most often will improve the speed of the indexing process.

5.4.3 Index Field Parameters

There are many things you can do to configure your index fields for automatic processing or to ensure the proper values have been entered. The following fields define each index value.

5.4.3.1 Type

The type defines the basic data type for data entry validation and automatic indexing. Each data type has its own unique set of *Template* (5.4.3.3) options that control formatting and other parameters. The following types are possible:

5.4.3.1.1 Autofill

All fields of this type are automatically populated with values from your database once the *Key Field* (5.4.4) has been entered. The *Template* (5.4.3.3.4) setting for this field must be set to the name of the corresponding field in your database.

5.4.3.1.2 Autonumber

Allows you to have a field with a numeric value that increments automatically under certain conditions. The *Template* (5.4.3.3.5) value for this field determines the seed number, and this can be any combination of letters and numbers as long as the last digit is numeric. Based on the value of the *Autonumber Increment* (5.4.6.1) setting, the *Autonumber* can be set to increment every page, every blank page, every barcode or at the end of each batch.

5.4.3.1.3 Barcode

If a barcode is recognized the value is inserted into this field. Use the *Template* (5.4.3.3.1) setting to force the field to accept only barcodes that match the specified pattern. This also allows you to match multiple barcodes to their appropriate fields, and ignore barcodes that are not meant to be used as indexes. Use the *Barcode* tab (5.5) to configure other barcode settings.

5.4.3.1.4 Date

Field is formatted as a date in YYYY-MM-DD format by default. This allows for use of dates in folders and filenames and for proper sorting. For more information see the *Template* (5.4.3.3.2) and *Date Formatting* (5.10.1.8) options. Valid dates from *Fixed* field templates (5.4.3.3.6) can also be used.

5.4.3.1.5 Filename

Field is automatically populated with the original filename of the image from the *Input* folder. Does not include the input file path.

5.4.3.1.6 Fixed

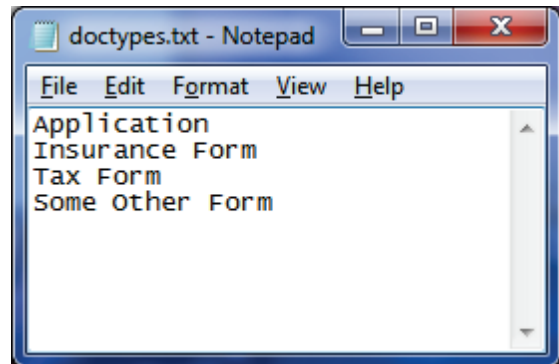
Calculated value from the *Template* (5.4.3.3.6) setting is used. There are many variables you can use to automatically insert various such as file

property settings, all or part of the file and folder names, combinations of other field values and system settings like the user ID, computer name, etc..

With a *Fixed* field the user cannot change the calculated value. Use a *Text*, *Numbers* or *Date* field to allow the user to modify a calculated value.

5.4.3.1.7 List

Possible index values are displayed in a drop-down list, allowing the user to select one or automatically fill in the field with matching records as they type. The list may be populated using either a text file or database.



To populate the list with a text file, create a file in Notepad that has a single entry on each line and enter the path to this text file in the *List File/Field* (5.6.3) setting. If no text file is specified and you have a database configured, the list for this field is populated automatically with the values from the corresponding database field.

5.4.3.1.8 Numbers

Only numeric values are accepted (5.4.3.3.2). Valid numbers from *Fixed* field templates (5.4.3.3.6) can also be used.

5.4.3.1.9 OCR

If an OCR value is recognized, it is inserted into this field. Use the *Template* (5.4.3.3.1) setting with this field type to search the OCR region for the first string that matches the pattern. Use the *List File/Field* (5.6.3) option to match OCR text against a list of possible values. Use the *Zones & OCR* tab (5.6) to configure other OCR settings.

5.4.3.1.10 OMR

Use this type for check-box fields. Field is considered “checked” if the number of black pixels in the region is greater than the number entered in the *Template* (5.4.3.3) setting.

OMR fields can also be used to extract a region from an image and save it to a separate file (5.10.2.2). Enter a negative number in the *Template* setting to save the region to a separate file if the number of black pixels is greater than the absolute value of this number.

5.4.3.1.11 *Template*

Forces the user to enter an index value that matches the pattern specified in the *Template* setting for this field. See (5.4.3.3.1) for the formatting instructions.

5.4.3.1.12 *Text*

User may enter any text into the index field. *Template* setting is used as a default value (5.4.3.3.2). *Fixed* field templates (5.4.3.3.6) can also be used to use a calculated value for the default.

5.4.3.1.13 *Unused*

This field will not appear in the index list. Useful for tabular grouping of index fields using the *Display fields* (5.4.2.2) setting.

5.4.3.2 **Name**

The value entered under *Name* is used for the field label in the index bar. This indicates to the user which value must be entered in that field.

5.4.3.3 **Template**

Depending on the field type, the *Template* setting can refer to several different things. Generally speaking, the *Template* setting is used to provide whatever additional data that is needed to define a field of that type.

Use the *Set* button to set the template for each field. Detailed instructions for that field type are displayed.

5.4.3.3.1 *Barcode, OCR and Template fields*

For *Barcode*, (5.4.3.1.3) *OCR* (5.4.3.1.7) and *Template* (5.4.3.1.11) field types, the *Template* setting represents a series of specific letter and number combinations that the field value must match. The possible values for the template are:

- *****: any character
- **#**: numbers only
- **A**: letters only
- **X**: any letter or number
- **?**: optional characters. When several **????**'s are placed at the end of a template, SimpleIndex will accept any letters, numbers or the characters **()-&%@** until a non-matching character is reached.
- **Other**: character must match exactly

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- \: enter backslash before *, #, A, X, ? or \ to indicate an exact match for this character in the template instead of the variable value
- |: use the pipe character to separate multiple search templates to allow searching of many variations on the field format

Some example templates are:

- **Invoice \#: #####**: the phrase "Invoice #:" followed by a 7-digit invoice number
- **###-##-####**: social security number
- **##/##/####|##/##/####|##/##/####|##/##/####**: date with 4-digit year and 1 or 2-digit month and day
- **ABC**##??**: Any letter, B and C only, any 2 characters, 2 numbers, 2 optional characters

In version 7, an interactive template editor was added to make it easier to design and test more complicated templates.



Enter the template in the first box and click the *Test* button to see what match results from the sample text. There is some generic sample text provided that has examples of many common data elements like names,

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dates and numbers. To test the template with your own documents, copy and paste the OCR text into this window. The new sample text will be used next time you open the Template Editor.

There are also several built-in templates available to make it easy to find several common data elements:

- %DATE% - find a date in any valid date format, including forms where the month is spelled out or abbreviated, 2 and 4 digit years.

The full Regular Expression for %DATE% is:

```
((J(anuary|uly|une)|February|(M(arch|ay))|(A(pril|ugust))|((Sept|Nov|Dec)ember)|October)|
(jan|feb|mar|apr|may|jun|jul|aug|sep|oct|nov|dec))
[.]{0,1}\s{0,1}[0-9]{1,2}[.]{0,1}\s{0,1}(19|20)\d\d|
(0[1-9]|[12][0-9]|3[01])\d\d((th|rd|st|nd){0,1}\s){0,1}(day\s){0,1}(of\s){0,1}
((J(anuary|uly|une)|February|(M(arch|ay))|(A(pril|ugust))|((Sept|Nov|Dec)ember)|October)|
(jan|feb|mar|apr|may|jun|jul|aug|sep|oct|nov|dec))\s{0,2}\s{0,1}(19|20)\d\d|
(0[1-9]|1[012]|[1-9])[- /.](0[1-9]|[12][0-9]|3[01])\d\d[- /.](19|20)\d\d|
(0[1-9]|[12][0-9]|3[01])\d\d[- /.](0[1-9]|1[012]|[1-9])\d\d[- /.](19|20)\d\d|
[- /.](0[1-9]|1[012]|[1-9])\d\d[- /.](0[1-9]|[12][0-9]|3[01])\d\d
```

- %DATE2% - find a date with a 2-digit year.
- %DATE4% - find a date with a 4-digit year.
- %MONEY% - find an amount of money.
- %PHONEUS% - find a US phone number in many common formats.
- %SSN% - find a US social security number in ###-##-#### format.

5.4.3.3.2 Text, Numbers and Date fields

For *Text* (5.4.3.1.12), *Numbers* (5.4.3.1.8) and *Date* (5.4.3.1.4) field types, the *Template* represents a default value that will appear automatically as the field value, but may be changed by the user if necessary.

For *Date* field types you may also enter a *Template* for automatic date formatting. Enter %MM/DD/YYYY% to format dates in Month/Day/Year format. Use %YYYY-MM-DD% to format for proper sort order in filenames. Any of date format masks used in Microsoft Office applications like Excel and Access may be used. There is also a global date formatting option in the *Advanced Options* screen that will reformat all date values in any field type, including *Barcode* and *OCR*.

These field types also accept the same constant values that *Fixed* fields use, such as %TODAY% for today's date. You should use these instead of a *Fixed* field if you want to allow the user to edit the calculated value. See below for the complete list.

For search configurations, you can enter <, >, <= or >= in the *Template* for *Date* or *Numbers* fields to enable date or number range searches. To create a minimum and maximum search field, create 2 fields that are linked to the same database field and enter >= for the minimum value and <= for the maximum.

5.4.3.3.3 List fields

For *List* (5.4.3.1.7) field types, the path to the text file containing the list values is entered in the *List File/Field* (5.6.35.6.3.1) setting. The *Template* field should be left blank.

5.4.3.3.4 Autofill fields

For *Autofill* (5.4.3.1.1) fields, the name of the corresponding database field for use in the lookup should be entered.

5.4.3.3.5 Autonumber fields

For *Autonumber* (5.4.3.1.1) fields, you may enter any letter and number combination, as long as the last digit is numeric. The last number or numbers are used as the numeric value to increment, with other characters remaining constant. It is recommended that you prefix the numeric value with enough 0's to ensure all numbers are the same length and preserve their sort order.

5.4.3.3.6 Fixed fields

For *Fixed* (5.4.3.1.6) fields, the template represents a pre-set value that cannot be changed. There are several variables that may also be used to substitute a calculated value based on system settings, input file path, file properties and other field values.

Input File Path

SimpleIndex has powerful file path parsing capabilities to get index data from existing folder and file names. This is very useful when migrating network files to a content management system or database. The following settings retrieve values from the original file path.

Examples will be given that assume an input file path of "**c:\Input\A\b\c\d_e_f.pdf**". The *Process Subfolders* (5.3.4.5) option is enabled and the *Input* folder (5.3.1.1) is set to "c:\Input".

- %FOLDER#% - returns the subfolder that is # levels below the *Input* folder. Using the example, %FOLDER1% will return "a", %FOLDER2% will return "b" and %FOLDER3% would return "c".

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- %FILE#% - splits the filename using the *Field Separator* setting (5.4.5.6) and returns section #. Using the example, %FILE1% would return "d", %FILE2% would be "e" and %FILE3% would be "f".
- %INFILE% - the original filename for the current file without the file path or extension. In the example this would be "d_e_f".
- %INFOLDER% - the name of the current *Input* folder. When processing subfolders this returns the root folder for the job. In the example this would be "Input".
- %INSUBFOLDER% - the name of the current subfolder being processed. In the example this would return "c".

Other Index Fields

- %FIELD#% - the value of the specified field #
- %FIELD#[Start,Length]% - part of the specified field from position Start for the next Length characters
- %FIELD#|Value% - the value of the specified field # or "Value" if the field is blank. Can be used with [Start,Length].

System Settings

- %USERID% - the SimpleIndex *User ID*
- %CONFIGNAME% - the name of the current configuration file (*.sic) without the file path or extension
- %CONFIGPATH% - the full path to the current configuration file
- %WINUSER% - the name of the user currently logged on to windows
- %COMPUTER% - the network computer name
- %BATCHID% - the SimpleIndex *Batch ID* (in the format YYYY-MM-DD@HHMMSS)
- %COLORDEPTH% - the number of bits per pixel in the image (1 for Black & White, 8 or 16 for Grayscale and 24 or 32 for Color)
- %PAGECOUNT% - the number of pages in the current file
- %FILEHASH% - the MD5 encrypted file hash string generated for the current file. This can be used to determine if a file's contents have been modified. Any changes made to the file will cause this value to change as well.

Batch Date & Time

The date and time that the batch is started is used when calculating the following field values:

- %TODAY% - the current date (in the format YYYY-MM-DD)
- %NOW% - the current date and time (YYYY-MM-DD HH.MM.SS)

- %YEAR% - the current year
- %MONTH% - the current month
- %DAY% - the current day
- %HOUR% - the current hour
- %MINUTE% - the current minute
- %SECOND% - the current second

File Properties

Version 7 allows you to populate index fields automatically from the file property tags in TIFF, JPEG, PDF and MS Office files. These values are the same ones that are displayed when you right-click a file and select *Properties* in Windows Explorer. For more information on file properties see *Set file properties on export* (5.4.5.3). The following properties values can be read:

All File Types

These properties are the ones used by Windows Search, SharePoint and other content searching applications to index documents.

- %TITLE%
- %SUBJECT%
- %AUTHOR%
- %KEYWORDS%
- %COMMENTS%

PDF Files

The Producer and Creator tags are set automatically when a PDF file is created. These can be read along with the above list.

- %PRODUCER%
- %CREATOR%

TIFF and JPEG Files

It is possible to read and write any standard EXIF tag value, but the most common ones have been included here. If you need to work with any tag not listed here please contact support.

- %ARTIST%
- %COPYRIGHT%
- %DATETIME%
- %EQUIPMAKE%

- %EQUIPMODEL%
- %IMAGETITLE%
- %PAGENAME%
- %SOFTWAREUSED%
- %USERCOMMENT%
- %INKNAMES%
- %HOSTCOMPUTER%
- %DOCUMENTNAME%
- %IMAGEDescription%

Values Calculated During Export

In some applications it may be necessary to output the export file path and other log values in specific positions within the index file. By default these values are inserted automatically at the end of the file. When exporting these values as *Fixed* fields, you should disable the *Include File Path Field* (5.8.4.3) and *Include Page Count & Batch ID* (5.8.4.4) settings to avoid duplicate fields.

- %OUTFILE% - the full or relative path to the output file (depends on Log settings)
- %OCRFILE% - the full or relative path to the OCR text file containing full-text data for the output file
- %PAGECOUNT% - the number of pages in the output file
- %BATCHID% - the unique ID for the current batch

5.4.3.4 Required

When this option is selected the user will not be able to finalize a batch unless all images have been saved with a value for this field.

5.4.3.5 Folder

This option uses the index value to create subfolders in the *Output* folder (5.3.1.2). If multiple folder fields are selected, nested subfolders are created in order from top to bottom.

5.4.3.6 Filename

When this option is selected, the image files are renamed using this index field value. If multiple fields have this option checked, the filename will contain all the values in order, separated by the *Field Separator* (5.4.5.6) character.

5.4.3.7 Forward

This option “carries forward” the field value to subsequent images until a new saved value is encountered. Use this to index multi-page documents without having to re-type the index data for each page. When unchecked, each page must be indexed individually.

When using coversheets created with SimpleCoversheet (7.3.20) or another barcode application, the forward option will automatically apply the barcode values to all the pages between the coversheets.

5.4.4 Autofill Settings

The *Index Autofill* feature is a powerful tool for automating data entry. Most of the time, the data that you are indexing exists in another database. Using the *Index Autofill* feature, users only have to enter a single field, and this value is used to retrieve the matching record and automatically populate the remaining fields.

The *Index Autofill* feature uses the same configuration options as are available with the *Data Source* (5.9.2) option on the *Database* tab. You may use the *Set* button to browse to an Access database or ODBC data source file. Alternatively, you may enter an ODBC data source name or OLEDB connection string in this field. Use the drop-down arrow to select the current data source from the *Database* tab. Refer to the *Database* settings (5.9) for more information on configuring a *Data Source*.

You can use either a table or a query as the source for your data. The field used to lookup data should be unique for every record. If multiple matches are found, the user is warned and the values from the first matching record is used.

To configure the *Index Autofill* feature, you must follow these steps:

1. Click the *Set Autofill Data Source* button on the *Index* tab
2. Enter a valid data source in the *Match Data Source* setting. If you have configured a data source on the *Database* tab, it will appear in the drop-down. Any

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valid Access database, ODBC or OleDB data source can be used.

3. Select the name of the lookup table or query in the *Match Table/Query* setting.
4. Select the primary database field used for lookups in the *Database Key field* setting. This field should uniquely identify a record in the lookup table.
5. Select the corresponding SimpleIndex *Key Field* in that setting. Values for this field are used to lookup records in the database.
6. Configure fields as type *Autofill* (5.4.3.1.1) and enter the corresponding database field names in the *Template* (5.4.3.3) setting for each

Other *Autofill* options:

- If a single field cannot uniquely identify records, you can configure a second lookup field. Both field values must match the record to use it for *Autofill* data.
- *Allow manual input in Autofill fields*: allows the user to manually type in data in *Autofill* fields if no matching record is found.
- *Automatically select first matching record*: if multiple matches cannot be avoided, check this option to automatically populate *Autofill* fields with data from the first matching record without prompting the user.

The *Autofill* settings are also used in *Match and Attach* (5.9.3.5) mode to specify the key field(s) used to determine a matching record. In this case the *Data Source* and *Match Table* should match the settings on the *Database* tab.

Following the database field name is a pipe “|” followed by the field type (String, Numeric or Date). This is required for SimpleIndex to properly format the lookup for numeric and date fields. If no pipe is found, the default value of String are used.

5.4.5 Other Indexing Options

5.4.5.1 Display images while processing

Selecting this allows you to specify whether to show the images while scanning, performing barcode processing and other automated tasks. Scanning and processing times can be significantly faster when images are not displayed, especially with high-resolution or color images. Only images file types can be displayed during processing.

5.4.5.2 Use Regular Expressions in templates

Check this option to enable Regular Expressions (RegEx) which allows you to define much more complex pattern matching templates using a standardized description language. Regular Expressions are a widely used standard, similar to “grep” for those familiar with UNIX.

In version 7 it is possible to mix templates, having some use Regular Expressions and others use the SimpleIndex template format. Simply precede any template with `^^` to indicate that template is a regular expression. Check this box only if all templates will use RegEx.

A complete description of regular expressions is beyond the scope of this document. However, you can search the web for the term “Regular Expression” to find many reference sites and samples for common data elements. Searching for the type of data you want with the term “Regular Expression” will usually take you right to an example of what you need. You will find there are often many ways to define the same pattern with RegEx. There are several RegEx formats available--SimpleIndex uses the "JavaScript" RegEx format, so keep this in mind when using third party RegEx tools.

Here are some example searches to help you find several common fields that are hard to capture with SimpleIndex templates but possible with Regular Expressions.

- [Email address regular expression](#)
- [Phone number regular expression](#)
- [Street address regular expression](#)
- [City state zip regular expression](#)
- [US Canada zip code regular expression](#)
- [UK zip code regular expression](#)

5.4.5.3 Set file properties on export

TIFF, JPEG, PDF and MS Office documents have various properties that can be indexed and searched by various engines like Google Desktop, Microsoft SharePoint and Search Server. SimpleIndex is able to update these property values using the data from your index fields.

The following properties can be set with any type of file:

- Title
- Author
- Subject
- Keywords
- Comments

To save the values for a particular field to one of these properties, enter the property name as it appears above in the *Name* setting for the corresponding field.

Enabling this option will increase the time it takes to export batches, in some cases significantly.

PDF files also have a *Producer* tag that can be set as well as the above properties.

There are several property tags (called EXIF tags) specific to TIFF and JPEG images that can be set as well. These are:

- ImageDescription
- Artist
- Copyright
- DateTime
- DocumentName
- EquipMake
- EquipModel
- HostComputer
- ImageTitle
- InkNames
- PageName
- SoftwareUsed
- UserComment

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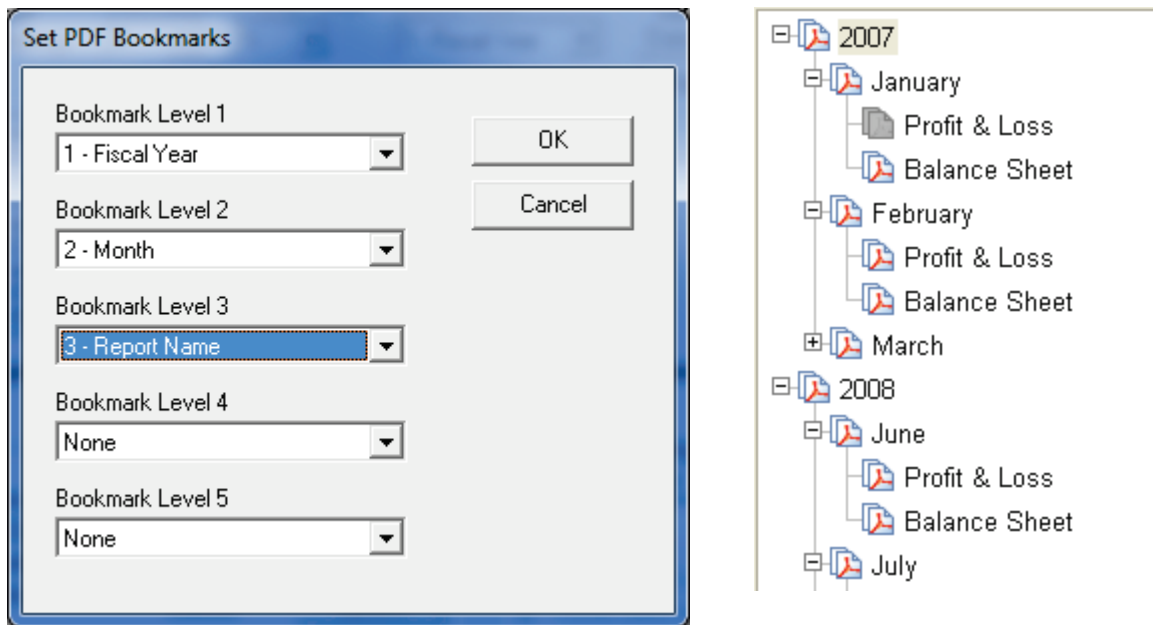
SimpleIndex has the capability to read and write any EXIF property tag, including non-standard and custom tags. Please contact support if there are any EXIF tags not listed here that are required by your application.

For a complete list of EXIF tags and their expected data types, see: <http://msdn.microsoft.com/en-us/library/ms534416>

5.4.5.4 Add bookmarks to PDF files

SimpleIndex has the ability to automatically add bookmarks to multi-page PDF files based on the index field values of the pages within it. Nested, multi-level bookmarks can be created in the same way that subfolders are created using the *Folder* (5.4.3.5) option.

These settings can be used to create a PDF file with the bookmark structure shown on the right.



When a file exists with the same name as the export file, pages are inserted into the correct bookmark section at the end. In the above example, if another file is scanned later with the index values "2007", "January", "Profit & Loss" it is inserted as the last page in the existing section. This powerful feature lets you use bookmarks as the primary method for organizing and categorizing the individual documents contained within large files like tax returns, medical records and HR files.

5.4.5.5 Show Index Grid After Processing

The index value grid view (7.2.5) is very useful for those reviewing documents after processing. Check this box to display it automatically so users do not have to click the toolbar option.

5.4.5.6 Field Separator

The character or characters entered here are used to separate multiple field values in the image filename. If field1 and field2 have the *Filename* option selected, and the separator character is “_” then the output file will be “field1_field2.tif”.

5.4.6 Autonumber Settings

Autonumber fields (5.4.3.1.1) can be used to add a unique sequential number to each scanned image or document. They are useful for *Bates Numbers* (5.7) and *Document Separators* (6.3), or to just provide a unique identifier for each file.

5.4.6.1 Increment Event

When there is an *Autonumber* field (5.4.3.1.1) present, this setting is used to determine when to increment the value.

5.4.6.1.1 Every Page

The number will be incremented on every page.

5.4.6.1.2 Blank Pages

The number is incremented each time a page under the *Blank Page Threshold* (0) is detected. This allows you to place blank pages between documents and create multi-page files automatically. This does not work with duplex scanning unless every back page has content on it.

5.4.6.1.3 Barcodes

The number is incremented each time a barcode field is recognized. Use *Templates* (5.4.3.3) and *Dictionaries* (5.6.3) to prevent unwanted barcodes from triggering the increment. The most reliable way to separate documents automatically is with barcodes.

If multiple barcode fields exist, any recognized field will trigger the barcode event.

5.4.6.1.4 End of Batch

The number is incremented at the end of each batch.

5.4.6.1.5 Every Max Pages

Increments the number every X pages using the *Max pages per file* (5.3.5.3). This is useful for scanning documents with a fixed number of pages.

5.4.6.1.6 First OMR Field

The first *OMR* field (5.4.3.1.3) is used to increment the Autonumber. This will allow you to draw an OMR zone in the corner of the page and use a black felt-tip pen to mark the first page of each file. This is far faster than the traditional method of inserting document separator sheets, and saves on printing costs.

The upper-left corner is recommended since it will have the same coordinates with any page size.

If multiple OMR fields exist, only the first one will trigger the Autonumber event.

5.4.6.1.7 First OCR Field

The first *OCR* field (5.4.3.1.7) is used to increment the Autonumber. Use *Templates* (5.4.3.3) and *Dictionaries* (5.6.3) to indicate the text that will trigger the increment event. This is useful if there is some unique text on the first page of each document that can be recognized.

For best results, use the *Fast OCR* option (5.6.5.1) for speed and enter multiple variations in the *Template* or *Dictionary* and enable the *Max Errors* option (5.6.3.3) to prevent OCR errors from missing the document break.

5.4.6.2 Skip deleted pages

When pages are deleted, this can cause gaps in the numbering sequence. This option will skip the numbering sequence on deleted pages so the output does not have gaps.

5.4.6.3 Save seed value after batch

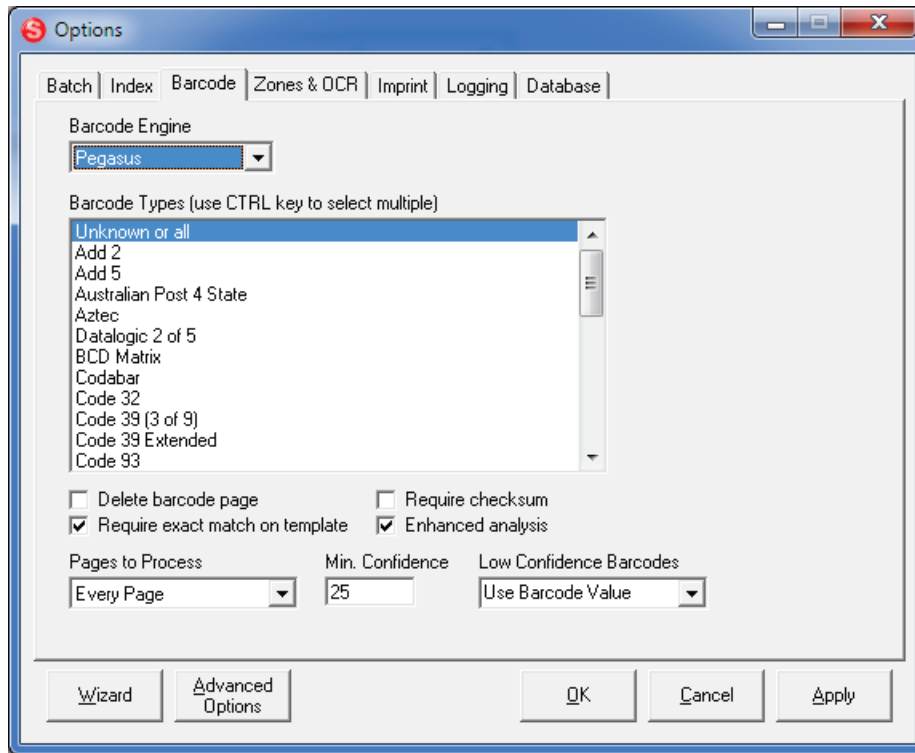
Check to automatically save the current *Autonumber* value after each batch to preserve it between sessions.

5.4.6.4 Reset seed value after batch

This option is used to save the seed value for an *Autonumber* field after each batch. By saving the configuration after each batch, the current value of the *Autonumber* is preserved when you exit SimpleIndex. If this option is unchecked, *Autonumber* fields will reset to their original value each time the job file is open.

5.5 Barcode Options

SimpleIndex can recognize a wide variety of 1D barcodes, as well as 2D PDF417 and DataMatrix formats with the 2D Barcode Recognition option.



5.5.1 Barcode Engine

SimpleIndex 7 introduces a new barcode recognition engine, as well as the ability to enable "Voting" or recognition with multiple engines for greatly improved accuracy. The available options are:

- **Pegasus** - this is the engine used in previous versions of SimpleIndex. The Pegasus engine is faster and more accurate. With Barcode-only license, Pegasus supports only 1D barcodes and has a limited processing speed. The Full license supports 1D and 2D barcodes and removes the limit on processing speed. To use the Pegasus engine in server mode you must purchase the *Pegasus Server* option.
- **DTK** - this engine was added in version 7 to enable 2D barcode support in the low-cost Barcode-only license, and to provide a low-cost solution for server-based barcode recognition. By default the Server license uses DTK for barcode recognition.

- **Voting** - select this option to have each image scanned with both barcode engines. This can greatly improve accuracy with hard-to-read barcodes like faxes and photocopies. This option also enables all possible barcode types where some are supported by only one or the other engine.

5.5.2 Barcode Types

SimpleIndex is capable of reading many different types of barcodes. You can select *Unknown or all* to recognize all types, or you can select one or more types to increase recognition speed and accuracy, and to reduce the possibility of detecting stray barcodes. Use the Shift and Control keys to select multiple values from the list.

It is not recommended that you use *Unknown or all* with the DTK barcode engine as this decreases the performance significantly.

5.5.3 Delete barcode page

Select this option to have the page with the barcode deleted from the final document.

5.5.4 Require exact match on template

Some document barcodes contain multiple data elements concatenated together. When this option is selected, *Template* and *Dictionary* matching must match the entire value of the barcode. When unchecked these are matched against any substring within the barcode, allowing you to extract individual values easily.

5.5.5 Require checksum

Misread barcodes can be eliminated by employing a checksum. If your barcodes contain a checksum, enable this option to verify the checksum against the recognized value. If they do not match the barcode is discarded. If you do not know whether your barcodes contain a checksum then leave this option unchecked.

5.5.6 Enhanced analysis

Some hard to read barcodes can be detected by performing various image enhancements on the image before recognition. Enabling this option will cause SimpleIndex to enhance and re-recognize pages when all expected barcode fields are not detected. This option is slower but can help recognize very hard to read barcodes.

5.5.7 Pages to Process

This option lets you select whether to process barcodes on every page, only the first page in the batch, or only on pages with more than 1 barcode.

When using a coversheet to index a single large document, it is much more efficient to process only the first page.

Some batches may have pages with stray barcodes that cannot be filtered out using a Template. If your coversheet has more than 1 barcode, you can filter out many of these false positives by selecting *Pages with >1 Barcode* for this option.

5.5.8 Minimum Confidence

Use this setting to force barcodes to be read with a high level of confidence before accepting the value. This prevents misread barcodes from being accepted as valid values. The setting must be a number between 0 (accept all recognized values) and 100 (accept only values with 100% confidence).

When SimpleIndex reads a barcode that falls below this confidence value, it performs various image enhancements on it and re-reads the image until all barcodes are above the minimum confidence. If all image enhancements fail to increase the confidence above the minimum, the barcode is considered “bad” and is handled that way regardless of whether a non-zero value was returned by the barcode engine.

5.5.9 Low Confidence Barcodes

This option lets you detect barcodes that are present on the document but not readable by the barcode recognition engine. When this happens you can choose to ignore the bad barcode, clear the field and stop forwarding or set the field to a pre-defined value. You may select one of the pre-defined options from the list or type any value you wish. If your barcode corresponds to a database field, be sure the value is valid for that type of field.

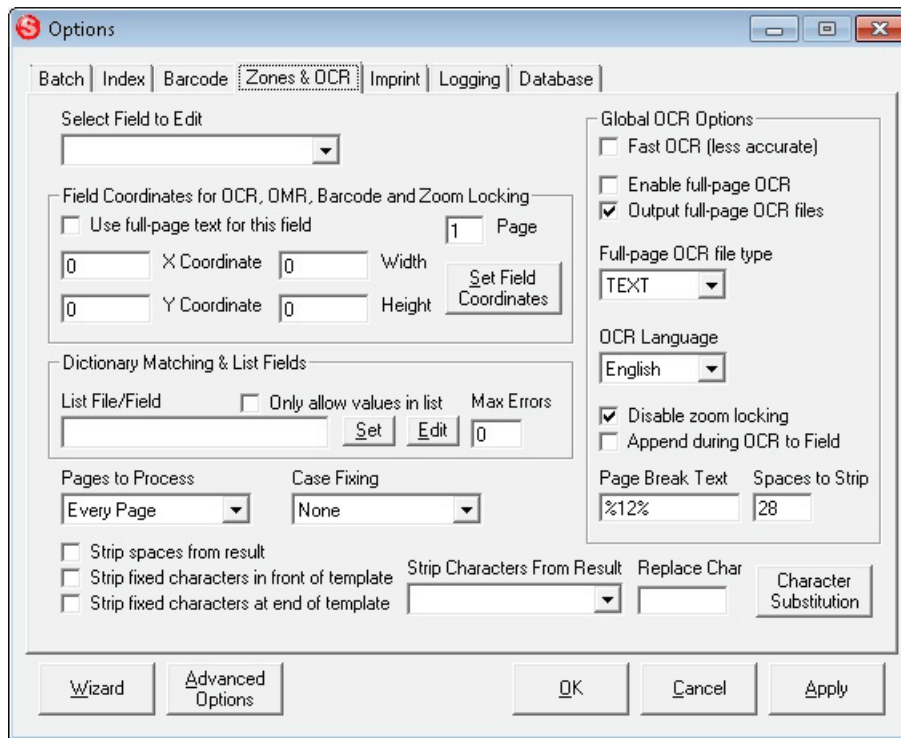
5.5.10 Setting Barcode Coordinates

In the *Field Coordinates* settings (5.6.2) on the *Zones & OCR* tab, you may set coordinates to limit the search area for barcodes.

5.6 Zones & OCR Options

The following settings control the *OCR*, *OMR*, *Barcode* regions and *Field Zooming* (7.4.5.11) features. When changing these settings, first select a

field from the list to load that field's settings.



5.6.1 Select Field to Edit

To configure settings for each field, select the field you want to edit from this list and the settings for that field is displayed. If the field type is not *OCR or OMR*, the coordinate values are used for *Field Zooming* (7.4.5.11) and other settings are disabled.

5.6.2 Field Coordinates

The field coordinate settings are used for OCR, OMR and barcode processing, as well as automatically zooming in on a region when you select a field (zoom locking).

5.6.2.1 Use full-page text for this field

This option must be selected to enable text processing for Office documents or PDF files. Selecting this option causes SimpleIndex to search the full text data for this image to find matching Template or Dictionary values instead of the zone coordinates.

If *Enable Full Page OCR* (5.6.5.1) is not selected, existing full text data from imported files is used. Existing full text can be obtained from text in imported PDF files or Office documents, or in text files that have filenames matching the corresponding images. For example, the text from c:\Input\0001.txt is assigned to the image c:\Input\0001.tif. If Enable Full

Page OCR is selected, existing text data is overwritten with the recognized text from OCR.

By combining the Template and Dictionary matching algorithms of SimpleIndex with the ability to search existing text, SimpleIndex has the ability to automatically re-index and reorganize large numbers of existing files very quickly.

5.6.2.2 X and Y Coordinates, Width and Height

These numbers define the dimensions of the OCR zone, as well as the region to zoom in on when a field is selected. These values are in pixels.

When the *Use Full Page OCR* (5.6.2.1) option is selected, the coordinates represent the starting row and column, number of rows and column width in the text file. This allows you to parse formatted text-based files by specifying the exact position of field data within the file, or improve performance by narrowing the search area. This option works with MS Office, PDF, HTML and Text documents.

You can set these values manually, or automatically by choosing *Set Field Coordinates* (7.2.6.4) from the *Mouse Action* menu on the main screen and drawing a box around the area you want to OCR or zoom in on.

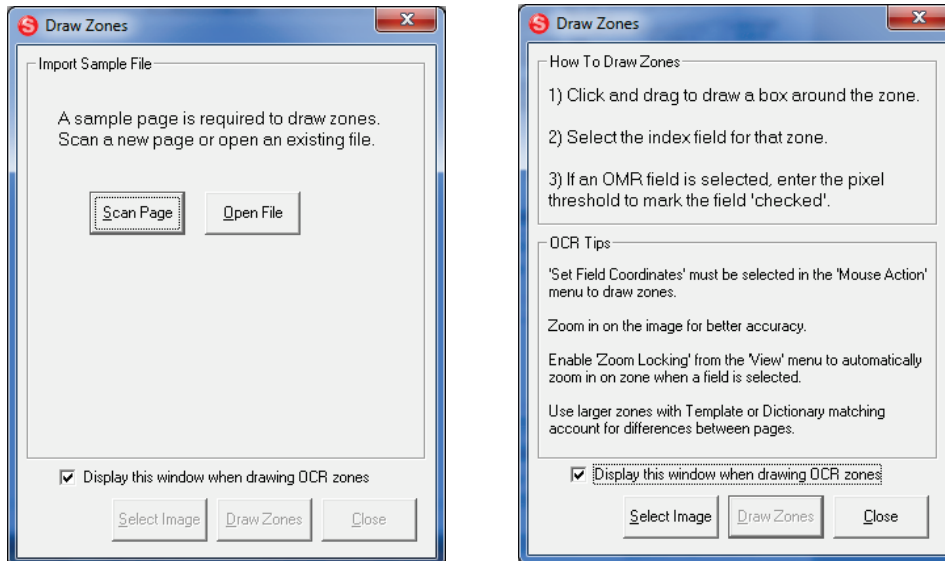
When using OCR with templates or dictionaries, it is better to set this area to be larger than what is needed to ensure the data is captured despite variability in the scans. You can even set this to the area of the entire image and the full text is searched for the matching value. Keep in mind that the larger this area is, the longer it will take to process the files.

5.6.2.3 Page

Indicates which page number the zone appears on in a multi-page file.

5.6.2.4 Set Field Coordinates

Clicking this button will save your current changes, hide the options screen and display the *Draw Zones* window.



If no file is displayed in the window, you will be prompted to scan an example page or open an existing file. Click the corresponding button to display a sample page on the screen.

Once the sample page is displayed, follow the on-screen instructions to draw OCR zones. Draw a box around the region to be recognized and you will be prompted to select the field for that region.

When you click *Close* the *Job Options* are displayed again.

Please Note: OCR zones cannot be resized, even though the image display will allow you to do so. Resized zones are not saved!

5.6.3 Lists and Dictionary Files

5.6.3.1 List File/Field

Enter the path to a text file containing a list of values, one on each line. The OCR zone is searched for each of these values until a match is found. This is the best way to automatically index files where the field will come from a list of known possible values that will appear somewhere on the page, but whose location may vary. This may also be used to correct for skew and other factors that can cause an OCR zone to move. Use the *Set* button to open a browse window to allow selection of a dictionary file.

When connected to a database, a field name may be entered here and the unique values from that field are used for a dictionary. This may be a field from either the *Data Source* setting on the *Database* tab, or the *Match Data*

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Source setting in the *Autofill* settings, allowing you to define a separate database for lists and export. You may also specify an alternate table for the list by using the form “TABLE|FIELD” for this setting.

It is also possible to specify multiple search values for each dictionary entry (“Thesaurus Matching”). This allows you to search for many possible matching variations on a field label and have a standard value inserted in the field. This is done by creating a pipe-separated list (“|”) of search values on each line. If any of these values is found in the search area, the first one in the list are inserted in the field.

For example, this list will find the correct state if the name, abbreviation or any of the major cities from that state appear in the search text:

```
California| CA |San Diego|Los Angeles|San Francisco  
New York| NY |Albany|Niagra|White Plains  
Texas| TX |Dallas|Houston|San Antonio  
Georgia| GA |Atlanta|Macon|Savannah
```

This entry will put the value “California” in the field if any of the words “California”, “ CA ”, “San Diego”, “Los Angeles” or “San Francisco” are found in the search text. Adding the space before and after “CA” ensures that the word “CAT” or “CAR” will not produce a false positive. This particular example was used to automatically classify tax documents coming from various municipalities by their state.

Another way to avoid false positives is to indicate negative keywords in the list. These are preceded by a “^”. For example:

```
North Carolina|Charlotte|Raleigh|Ashville|^Nashville
```

Will prevent the word “Nashville” from matching on “Ashville” and giving a false positive. Dictionary terms are read from right to left, so place the negative keywords on the end of the line to search for the negative terms before a match is found.

When designing dictionaries it is important to note that the values in the dictionary are searched **in order** until the first match is found. In order to minimize false positives, the most unique values should be placed first in the list and values that may appear in other documents should be placed at the end.

For example a vendor list for an invoice processing job may contain the entry “Microsoft”. However it is likely that other invoices may contain this word as part of an item description. Hence, “Microsoft” should be placed towards the end of the vendor list.

5.6.3.2 Only allow values in list

Check this option to prevent users from manually entering a value that is not in the list of pre-defined values from the list file.

5.6.3.3 Max Errors

This feature lets you automatically correct for mistakes in the OCR when using dictionaries. This setting is a decimal value, usually between 0.05 and 0.30. This value is multiplied by the number of characters in the dictionary entry to determine the number of incorrect characters the field will accept.

For example, if *Max Errors* is set to 0.20 and the current dictionary entry is:

Simple Software

The dictionary entry has 15 characters, $\times 0.20 = 3$ non-matching characters will be accepted for this value. This means that “5imp1e S0ftware” will also be recognized correctly as “Simple Software”. If the dictionary entry had 4 or fewer characters, all would have to be correct to consider the value a match. Be careful not to set the *Max Errors* percentage too high in order to prevent false positives!

5.6.4 Advanced OCR Options

5.6.4.1 Pages to Process

Using this option you may limit the OCR to only certain pages within the batch. This option greatly speeds up the OCR process if you know the location of those pages in the batch that contain the index information you need. The options are:

- **Every Page** – all pages are processed.
- **First Page Only** – only the first page in the batch is processed.
- **Pages with Barcodes** – only a page where a barcode is detected is processed. Use the *Template* and zone features to prevent detection of stray barcodes.

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- **Pages After Barcode** – use this option with separator sheets like the ones created by *SimpleCoversheet* (7.3.20) where the first page of the document comes after a barcode separator sheet.
- **Pages After Blank** – use this option with blank page separators to indicate the start of a new document on the following page.
- **Odd Pages** – OCR only Odd numbered pages (1,3,5,etc.)
- **Even Pages** – OCR only Even numbered pages (2,4,6,etc.)
- **Pages without Barcodes** -

5.6.4.2 Case Fixing

This option allows you to automatically case fix the OCR results, forcing the results to be all UPPER CASE, lower case or Title Case (first letter of each word). If a Dictionary File is specified, the case used in that file will override this setting.

5.6.4.3 Strip spaces from result

This option strips any spaces from the OCR result. This is very useful when using template matching or dictionary lookups because spaces are sometimes recognized by mistake, causing the match to not be found. The *Spaces to Strip* (5.6.5.9) option can be used to modify the behavior of this function to strip other classes of characters.

5.6.4.4 Strip fixed characters in front of OCR template

This option allows you to use text “markers” to determine the position of a field when there is no unique template or dictionary lookup possible. For instance, an invoice number may always follow the word “INVOICE” on certain documents. Checking this option will allow you to enter “INVOICE #####” as the OCR template but only have the invoice number and not the word “INVOICE” show up in the field.

5.6.4.5 Strip fixed characters at end of OCR template

Same as the previous option but strips fixed characters from the end of the template instead of the beginning, in case the marker appears after the text you are trying to recognize.

5.6.4.6 Strip Characters from Result

Enter a list of characters that you want to remove from OCR results prior to template and dictionary matching. You can also use this in place of templates by removing all unwanted characters from your OCR zone and leaving the results. This technique allows you to get a partial result when recognition mistakes take place, when templates or dictionaries will leave a blank field.

This setting can also be used with non-OCR fields to remove unwanted characters from barcodes, database fields, dates, etc.

Here are several helpful hints for using this setting:

- Enter the values %LF% and %TAB% to remove line breaks and tab characters, since these cannot be typed.
- There are several examples available in the drop-down menu with common lists of characters that can be selected automatically.
- You can manually type or copy/paste values into this field.
- A good technique to use is to copy and paste any extra characters that appear in that field during OCR until only valid characters remain.
- Use Notepad to edit a long list of special characters or to save lists for later use.
- Use the Character Map (in Start Menu/Accessories) to find special characters.
- Enter %##% to replace a specific ASCII character with numeric value of ##. For example, %13% will remove line feeds.
- Set the Replace Character option to replace stripped characters with another.

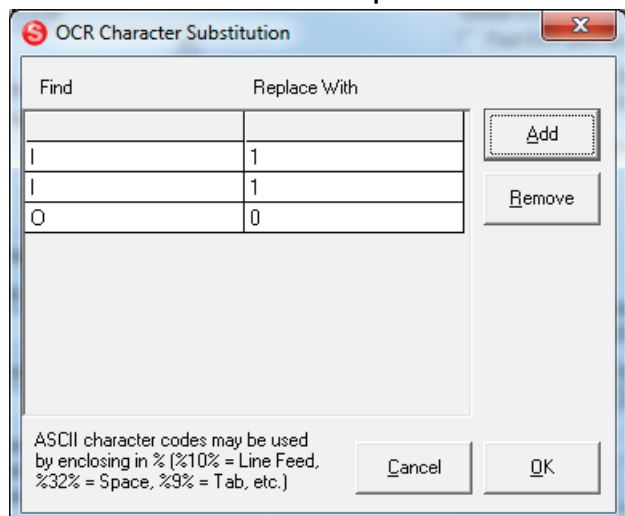
5.6.4.7 Replace Character

Enter a character or characters here that will replace those stripped using the *Strip Characters From Result* (5.6.4.6) option. This allows you to replace common mistakes, such as l and 1 or O and 0, or substitute a space or dash for line feeds and other unwanted characters.

ASCII character codes may be entered in this field to allow special characters to be used for replacement. For example, the single space character can be entered as %32%, Line Feeds are %10% and Tabs are %9%. A full list of ASCII character codes can be found if you search the web for “ASCII Table”.

5.6.4.8 Character Substitution

This option allows you to define several specific find and replace operations on images that will take



place before template and dictionary matching. This is useful for correcting common OCR errors automatically, such as a "1" being recognized as "l". Substitutions can be single characters or whole words and phrases. It is also possible to replace unprintable characters such as tabs and line feeds by entering their ASCII character code (e.g. %10% for line feeds).

5.6.5 Global OCR Options

The global OCR options are settings that do not depend on the selected field. These include full-page OCR settings and training options.

5.6.5.1 Fast OCR

Check this option to use a faster but less accurate OCR analysis on images. For high-quality images using standard fonts, Fast OCR provides comparable accuracy with much faster processing speed. In many cases it is much faster to use this option even if a few more files require manual correction.

5.6.5.2 Enable full-page OCR

Selecting this option will cause all image files in the batch to be OCR'ed. The entire file is processed, generating full-text data that can be used for auto-indexing and full-text searching.

It is also possible to have the OCR results output to MS Word or HTML formats that can be edited in a word processor (5.6.5.4).

5.6.5.3 Output full-page OCR files

When this option is checked, full-page OCR text is written to text files using the same folder and filename scheme as the images. If unchecked, no text files are created. Text from MS Office and PDF files are also be saved as text when selected.

5.6.5.4 Full-page OCR file type

Select the type of file that is output by the full-page OCR engine. If you have OCR zones defined this must be set to TEXT. Other options are WORD or HTML.

5.6.5.5 OCR Language

Select the default language for OCR text. By default, only English, French, Spanish, Italian and German languages are installed. Additional languages can be provided by request.

5.6.5.6 Disable zoom locking

Zoom locking causes the image to be zoomed in on the zone automatically when a field is selected. If no coordinates are indicated a field will not zoom. However, OCR fields must always have coordinates. Zoom locking can be helpful when reviewing OCR results or keying in handprint data. Disable zoom locking if you prefer to keep your selected zoom on each field.

5.6.5.7 Append during OCR to Field

By default the *OCR to Field* (7.2.6.3) option automatically advances to the next field after you draw a zone. Select this option to keep the cursor in the selected field so additional text can be added. This is useful for capturing data from multiple lines or regions into the same field.

5.6.5.8 Page Break Text

The following value is output after each OCR page to indicate page breaks in the text file. This string is also used to parse the OCR output when creating searchable PDF files. In this case, the value should be something that will never occur naturally within the text of your documents.

5.6.5.9 Spaces to Strip

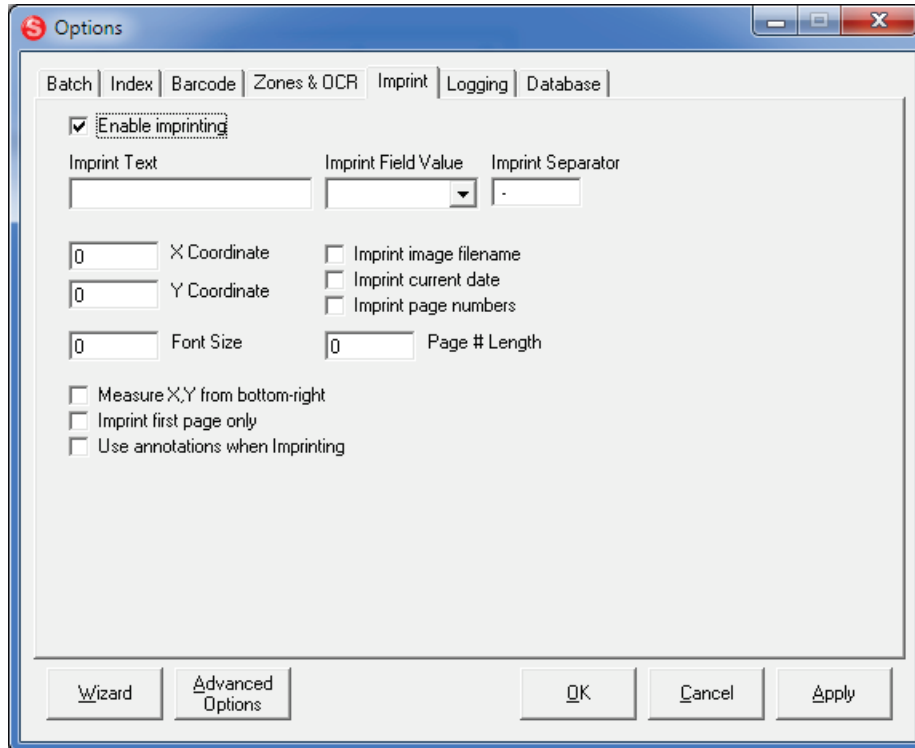
This option allows you to modify the default behavior for space trimming on OCR fields. Affects all OCR fields where *Strip spaces from result* (5.6.4.3) is selected. Add the numbers for all space trimming options you want to enable and enter the total.

- 1 - Remove spaces & line feeds from beginning
- 2 - Remove spaces & line feeds from end
- 4 - Remove all spaces and tabs
- 8 - Remove all line feeds
- 16 - Convert all blank space to single spaces
- 32 - Remove all non-alphanumeric characters except spaces
- 64 - Replace line feeds with <lf>
- 128 - Remove all non-alpha
- 256 - Remove all non-numbers
- 16384 - Run Trim function after template matching

5.7 Imprinting Options

Imprinting is a great feature for lawyers needing to bates stamp their legal documents, as well as anyone who wants to add a header, footer, page number or any other mark to each image they process. Imprinting works

on both black & white TIFF and PDF files. Color TIFF and JPEG images cannot be imprinted.



5.7.1 Enable imprinting

Checking this causes SimpleIndex to stamp each image with the imprint text and/or page number entered in these options.

5.7.2 Imprint Text

If a value is entered here, it is used as the first characters of the imprint. For example, the value "Page" with the *Imprint Page Numbers* (5.7.9) option selected will imprint "Page - 001", "Page - 002", etc.

5.7.3 Imprint Field Value

The value for this field on the first image of the batch is imprinted.

5.7.4 Imprint Separator

If multiple values are imprinted, they are separated by the characters in this field.

5.7.5 X, Y Coordinates

The coordinates for the location of the imprint on the image, in pixels.

5.7.6 Font Size

The size of the font to use in the imprint.

5.7.7 Imprint image filename

When selected, the imprint will use the filename as the base value. Any index fields or recognition results that have been selected for use in the filename will appear in the imprint as they do in the filename, followed by the page number if that option is selected.

5.7.8 Imprint current date

Adds the processing date to the imprint in the format “YYYY-MM-DD”.

5.7.9 Imprint page numbers

When selected, the page numbers are printed at the end of the imprint string. If the *Imprint Text* (5.7.2) is “EXAMPLE” and the *Page # Length* (5.7.7) is set to 4, each page is stamped with “EXAMPLE-0001”, “EXAMPLE-0002”, etc.

5.7.10 Page # Length

The number of characters to use in the page number. Entering “3” here will produce page numbers “001”, “002”, “003”, etc.

5.7.11 Measure X, Y from bottom-right

When selected, X and Y are measured from the bottom-right instead of the top-left. This makes it easier to specify imprinting on the bottom of the page.

5.7.12 Imprint first page only

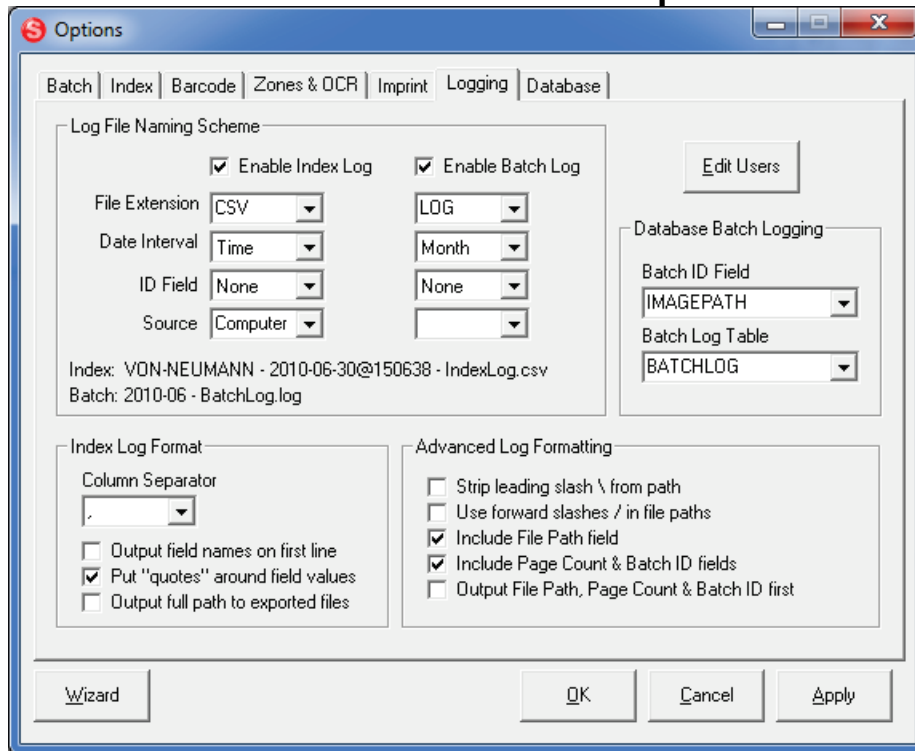
Places the imprint only on the first page of multi-page files.

5.7.13 Use annotations when imprinting

Imprints images with annotations that do not alter the original image data.

5.8 Logging Options

Up to 3 logs are created depending on the options you have selected. An Index Log that contains the Index Data, a Batch Log that contains the user batch and productivity tracking information, and an optional Audit Log that contains information about missing required documents when that feature is enabled.



5.8.1 Log File Naming Scheme

Index log filenames are generated using the Index Interval, ID Field and Source values. Batch log filenames, as well as the Batch Identifier used to track productivity, are all generated using the Batch Interval, ID Field and Source values. Filenames are generated in the format **Source-IDField-YYYY-MM-DD@HHMMSS**.

There are several parameters available to serve as the component parts of the filename. When more than one batch generates the same log filenames, information is appended to the end of the existing files.

5.8.1.1 Enable Index Log

Enable/Disable creation of Index Log files.

5.8.1.2 Enable Batch Log

Enable/Disable creation of Batch Log files.

5.8.1.3 File Extensions

Sets the file extension to use for the log files. Use the *Default* setting to use IDX for Index logs, LOG for Batch logs and AUD for Audit logs. You can select one of the pre-defined values or type any extension you wish.

Using custom file extensions lets you choose the application to use to view the data. TXT files will open in Notepad, CSV files in Excel. Use the TSV extension to create Tab-separated files that can be opened in Excel. TSV files can contain field values with commas, unlike CSV.

5.8.1.4 Date Intervals

This appends the batch date and time to the log filename. Depending on the interval selected, the corresponding level of detail is used in the filename. The result is that a new log file is created every hour, day, week, etc. depending on the option you select. Select *Time* to use the full date and time to the second, with the result that a unique file is created for each batch.

The full date and time is always used in the Batch ID, in the format **YYYY-MM-DD@HHMMSS**. The Interval only affects the log filenames.

Since Index logs contain many more records than Batch logs, it is often practical to use a much larger interval for the Batch logs to prevent too many files from being created.

5.8.1.5 ID Field

Selecting a field in this option will cause the value for this field to be used in the Batch log filename. If multiple values exist in the batch, only the first one is used to identify the log.

5.8.1.6 Source

These fields are used as identifiers for the location, project, user or workstation that processed the batch. Pre-defined values exist for the computer's Network ID, SimpleIndex User ID or both. It is also possible to enter any other value you wish and it will appear in the Batch ID and/or log filenames.

If multiple users are saving logs to a common network share, use this field to ensure each user creates unique log filenames.

5.8.1.7 Log File Examples

When modifying the options that generate the log filenames, use the *Log File Examples* to see what the resulting filenames will be. After changing one of the values, the examples are updated once you click on another field.

5.8.2 Database Batch Logging

These options let you configure a custom database table to store log information.

5.8.2.1 Batch ID Field

In *Insert* (5.9.3.2) mode, the selected field is set to the Batch ID generated using the values from the Logging tab. In *Update* (5.9.3.3) mode, each user is assigned batches according to the values in this field. This is important to ensure that similar documents are all indexed by the same user. When used in conjunction with the *Batch Log Table* (5.8.2.2), a highly detailed production log is generated automatically for each user.

The *Batch ID Field* is optional. If unused, users in *Update* mode are assigned the next X images, where X is the value of the *Maximum Files/Batch* (5.3.4.2) setting under the File tab. The *Batch ID Field* is required if the *Batch Log Table* is used for productivity tracking.

5.8.2.2 Batch Log Table

The *Batch Log Table* is a table with several specific fields that store information about user productivity. For each batch that a user completes, a record is created that stores information about how long it took to index the batch. The *Batch Log Table* must contain the field names and data types listed in the table below:

Field Name	Data Type	Description
Primary Key	Autonumber	This field can be any name and any auto-generated data type.
BatchID	String	Stores the ID string for each batch.
Username	String	The User ID for the person that indexed the batch.
BatchStart	DateTime	Starting date and time for this batch.
BatchEnd	DateTime	Ending date and time for this batch.
BatchTime	Float/Single	Decimal number representing batch completion time in minutes.
BatchPages	Integer	Number of pages in the batch.
Revision	String	Revision Level for the batch.

5.8.3 Index Log Format

5.8.3.1 Column Separator

This character is inserted between values in the log files to separate one value from the next on each line. The default delimiter is a comma, but

TAB or Pipe “|” often work better, particularly with values that may contain a comma. You may select one of the pre-defined values or enter any character(s) you wish to use.

5.8.3.2 Output field names on first line

Check this option to have the names of each index field output in the first line of each index log file.

5.8.3.3 Put “quotes” around field values

If checked, the delimited log files will have quotes surrounding each field value. This makes it possible to include the column delimiter in the index values without them being interpreted as additional fields.

5.8.3.4 Output full path to exported files

If checked, the full path to the image file is stored in the log. If unchecked, the *Output* folder (5.3.1.2) is stripped from the beginning of the path, allowing you to use relative paths to indicate the location of your images. This makes it much easier to move images to a new server in the future.

5.8.4 Advanced Log Formatting

5.8.4.1 Strip leading slash \ from path

By default, relative paths are output with a \ as the first character. If there are no subfolders, the filename is output with a \ in front of it. Some applications will require that just the filename be output. Check this option to enable that.

5.8.4.2 Use forward slashes / in file paths

When the destination database is used on a website or UNIX file system, forward slashes should be used instead of the default backslash. This lets you link images indexed with SimpleIndex directly to a web database without having to modify the output.

5.8.4.3 Include File Path field

This option is checked by default and causes the output file path to be exported automatically after the last index field. In some applications, only the index data is relevant, or you may need the output file in a specific position within the file. Uncheck this box to disable automatic output of the export file path.

You may use a *Fixed* field (5.4.3.1.6) to output the File Path, OCR File Path, Page Count and Batch ID values in specific positions within the file.

5.8.4.4 Include Page Count & Batch ID fields

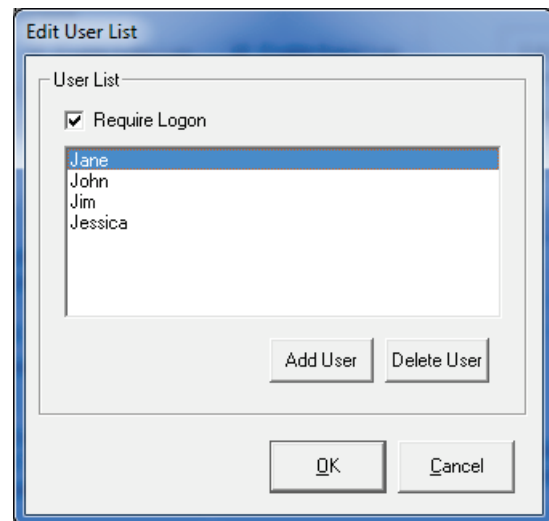
By default the last 2 fields in the index log are the Page Count and Batch ID. These fields may not be needed and can prevent the file from importing properly, so uncheck this option to leave them out of the Index log.

5.8.4.5 Output File Path, Page Count & Batch ID first

When checked, the image file, batch ID and page count is output first and index field values are output last. This lets you have a variable number of index fields while keeping the image path in the same position.

5.8.5 Edit Users

The user list is used to track user productivity, as well as to connect to password-protected databases. When a SimpleIndex job that requires logon is opened, the user is prompted to select their name from a list. Unless a password-protected database is used, the logon is only used to track productivity information. SimpleIndex does not have an internal user password—if your database does not require a logon, you may leave the password field blank.

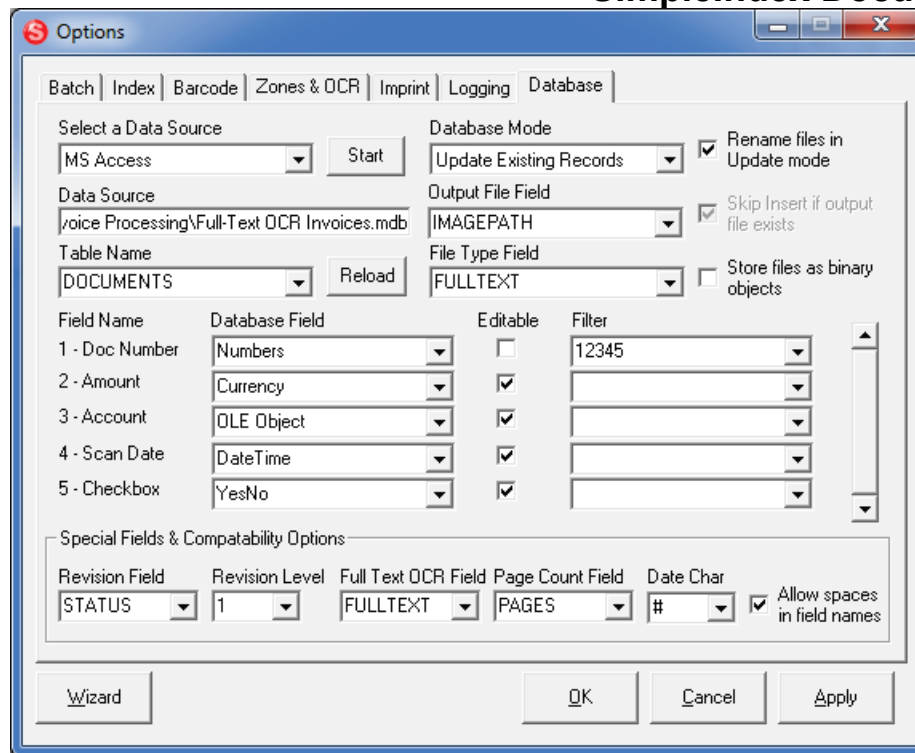


Use the *Add User* and *Delete User* buttons to modify the user list. If *Require Logon* is checked but no users are entered in the list, the user is able to type any name they wish to use.

5.9 Database Options

SimpleIndex's database functions give you the ability to export index data directly to any database, as well as search, view and update images that already exist in a database.

Database options should be set by someone who is knowledgeable about the database and has the necessary permissions to modify tables and views if necessary. Novice users may automatically configure SimpleIndex to use a generic database configuration if they wish to use a database to store index data or enable use of the *Media Wizard* (7.4.7.6) to burn searchable CDs or DVDs.



5.9.1 Design Overview for Database Connectivity

This overview will help you understand the overall database configuration scheme. The sections that follow give detailed descriptions of how to configure each setting on the database page.

The database interface with SimpleIndex was designed to provide low-level interaction with any database to provide a wide variety of new functionality for a multi-user environment. Most document capture software comes with its own internal database that is used to manage scanned batches and index values until they are exported to an intermediate format that is finally imported into your database. SimpleIndex exports index data directly to fields in your database, thus bypassing the intermediate stages and giving you instant access to new images. This also allows SimpleIndex to work directly with custom database programs without any custom programming.

SimpleIndex's database interface provides this functionality by operating in four "modes" (5.9.3): *Insert New Records*, *Update Existing Records*, *Retrieve and View Records* and *Match and Attach*.

1. When images are scanned, records must be "inserted" into the database to store the image file location and pre-indexed data (5.9.3.2).

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2. Manual indexing is done by retrieving a batch of records on another workstation and “updating” them with the correct index data (5.9.3.3).
3. Users may view scanned images by “retrieving” them from the database based on index criteria and viewing the matching documents (5.9.3.4).
4. Existing database records can be updated in batches, linking files and updating index fields automatically (5.9.3.5).

Processing stages can be tracked using the *Revision Level* (5.9.13) field. This field keeps track of how many times a document has been processed (scanning, indexing, double-key verification, QC review, etc.) as well as who is currently working on a document.

SimpleIndex assumes the database is configured to have a single table or query that contains all the index fields, and a field to link the image using the full or relative path to the image file. Optionally this table can include fields for the batch ID (5.8.2.1), page count (5.9.15) and full-text OCR (5.9.14). You may also store batch log information in a separate table for productivity tracking (5.8.2.2).

5.9.2 Select a Data Source

The drop-down menu in the upper-left contains a list of configuration options for your data source. Select an option from the list and click the *Start* button to run the corresponding configuration wizard.

The *Data Source* field is populated automatically by these wizards. This field may be configured manually using the following methods:

1. Enter the ODBC System or User data source name
2. Enter the path to an ODBC file DSN
3. Enter the path to a MS Access database file
4. Enter any valid OLEDB Connection String

The OLEDB Connection String lets system administrators create a single SimpleIndex configuration that any network user can use to connect to a database without additional configuration. A wizard is provided to configure MS Access, SQL Server, Oracle and MySQL connection strings. Connection strings for Sybase, DB2, FileMaker and others can be entered manually. See your database documentation or Google “[OLEDB connection string](#)” for more information on creating connection strings.

When configuring connection strings, you may leave out the User ID and Password to use the ones entered in the SimpleIndex user logon.

The following wizards are available to automate database configuration tasks:

5.9.2.1 Create Generic Access Database

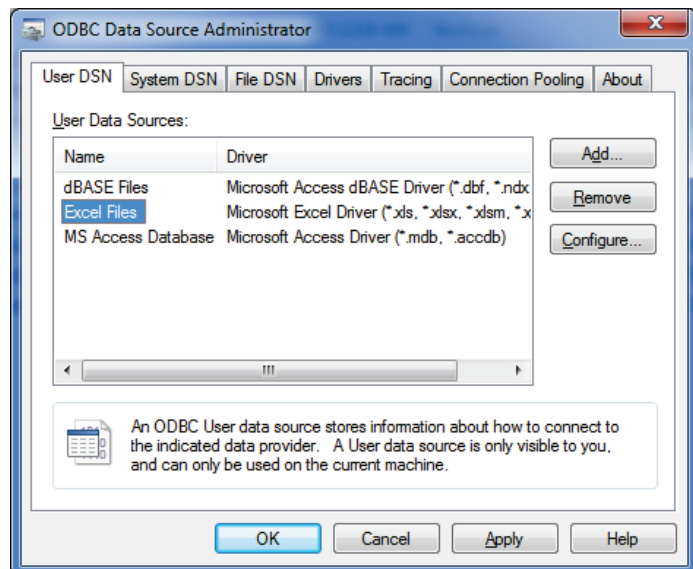
This wizard copies a pre-configured Access database to the folder you select and automatically configures all database options to use the defaults from this database. By using generic field names and types for all fields, SimpleIndex is able to connect any existing configuration with up to 25 index fields to a database, enabling the SimpleIndex multi-user scanning and retrieval options instantly.

The blank database that comes with SimpleIndex has its own built-in search interface that allows you to find and view the documents it contains on any computer with Microsoft Access (2.4). The default template for this search interface may be changed by modifying the forms in the file “BlankDB.mdb” in your installation folder. **Warning:** modifying the field names of the tables in this database will cause this wizard to no longer function with the default settings.

5.9.2.2 Configure ODBC

ODBC allows you to configure connections to a wide variety of databases and flat files. With ODBC, all connection and security information is pre-configured in a *Data Source*. Once configured, SimpleIndex only needs to know the name of the data source to connect to the database.

When using ODBC to connect to a database, you must first configure the data source in the ODBC Data Source Manager. Use the Configure ODBC option to open the ODBC manager, or find it in your Windows Control Panel (in 2000/XP it is found in the “Administrative Tools” folder).



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For User and System DSNs, each database has a unique data source name which you must enter in the *Data Source* field exactly as it appears in the manager. For File DSNs, configure and save the DSN file and enter the path to that file in the *Data Source* field. The *Select ODBC File DSN* wizard allows you to browse your computer and select an existing File DSN using a common dialog interface.

Please consult the ODBC Data Source Manager help file for more information on how to create data sources.

5.9.2.3 MS Access

This option will display an Open File dialog prompting the user to select an existing MS Access database to use with SimpleIndex. The path to this database file is entered in the *Data Source* field.

After selecting the database you are prompted to configure MS Access Workgroup security. If your database is protected by a workgroup file, choose Yes and select the MDW file on the next screen. The User ID and Password entered in your SimpleIndex logon (5.8.5) are used to connect to the database. You may bypass logon by adding them to the OLEDB connection string directly (e.g. “;User ID=XXX;Password=XXX”).

If your Access database is protected with a simple database password, simply enable logon (5.8.5) and enter any User ID with the correct database password and you are able to connect. You can also add the password to the connection string (e.g. “;Jet OLEDB:Database Password=XXX”).

You may also configure connections to secure MS Access databases using ODBC.

5.9.2.4 SQL Server

This option will prompt the user to enter the name of an MS SQL Server and database to use with SimpleIndex. The server name and database name are used to automatically create an OLEDB connection string that is entered in the *Data Source* field. Configures the *Date Delimiter* (5.10.4.4) and *Allow spaces in field names* (5.10.4.1) settings for SQL Server compatibility.

5.9.2.5 Oracle

Configures the *Date Delimiter* (5.10.4.4) and *Allow spaces in field names* (5.10.4.1) settings for compatibility with Oracle data sources. *Data Source*

setting is not configured—ODBC or OLEDB connection string must be entered manually.

5.9.2.6 MySQL

Configures the *Date Delimiter* (5.10.4.4) and *Allow spaces in field names* (5.10.4.1) settings for compatibility with MySQL data sources. *Data Source* setting is not configured—ODBC or OLEDB connection string must be entered manually.

5.9.2.7 Select ODBC File DSN

This option will display an Open File dialog prompting the user to select an existing ODBC File DSN to use with SimpleIndex. The path to this file is entered in the *Data Source* field.

5.9.3 Database Mode

5.9.3.1 Disabled

Select this option to disable the database interface.

5.9.3.2 Insert New Records

Insert mode causes SimpleIndex to insert new records into a database that correspond to the index values for your scanned images. This option lets you populate the document database with new records for files processed by SimpleIndex. The files in this database can then be searched and viewed with *Retrieval* mode (5.9.3.4) or edited with *Update* mode (5.9.3.3).

5.9.3.3 Update Existing Records

Update mode configures SimpleIndex to retrieve existing images and index information from the database and display it to the user. The index data can be reviewed and modified, and images can be added, modified or rescanned if necessary. The *Update* feature can also be used to automatically create folder hierarchies and give meaningful filenames to images while preserving their link with the database records.

There are several useful applications of the update feature of SimpleIndex:

- Quality control review & rescanning
- Verification of index values
- Unattended processing
- Distribute indexing among multiple users
- Automatically rename existing image files using index values
- Search tool to find and view specific images

5.9.3.4 Retrieve and View Records

Retrieval mode lets you find documents with keyword searches and view the matching files. *Retrieval* mode is used interchangeably with *SimpleSearch*. *SimpleSearch* is a retrieval-only license for SimpleIndex that allows only *Retrieval* mode configurations to be run.

In *Retrieval* mode the index fields on the main screen become search fields and the *Save Index* and *Save All* buttons become *Search* and *Clear*. To find documents, type the search criteria into the index fields and click the *Search* button. Use *Clear* to start a new search. See (7.5) for more information on searching and viewing documents in *Retrieval* mode.

5.9.3.5 Match and Attach Records

Match and Attach mode lets you associate scanned images with existing records in the database without recreating them or updating them one-at-a-time. To use this mode, select a key field using the *Autofill* settings (5.4.4). This key field is used to lookup matching records in your database. When a batch is exported, a lookup is performed for each file. The matching record for that file is updated with the image file path and other data entered into SimpleIndex fields, leaving the rest of the data in the table intact.

This is the quickest method for image-enabling an existing database application. All you need to do is add a field for the image file, then configure a *Match and Attach* configuration that indexes documents based on the primary key and fills in this field automatically.

5.9.4 Table Name

SimpleIndex is designed to store index information and the path to the image files in a single table or query. Select table or query that will store this information here.

To use SimpleIndex in Insert Mode, the table or query must have a primary key that is generated automatically (Autonumber, GUID, etc.).

Use the *Reload* button after you have entered the name of your table to load the field selectors with a list of the available fields from that table.

It is possible to use a query (also called a view) that allows you to store index information and image data in separate tables. Depending on the database type, there are constraints on the field relationships necessary to create a query that supports inserting and updating. Please ensure your

query is updatable before using it with SimpleIndex. Consult your database documentation for more information on creating updateable queries.

5.9.5 Output File Field

The *Output File Field* is used to store the path to the image file corresponding to the current record.

It is recommended that you use the relative path instead of the full path to store the image filename. Doing this allows you to move the images to another storage server without having to perform a complex update on this field to reflect the change. Uncheck the *Output full path to exported files* option (5.8.3.4) to store the relative path, leaving off the *Output* folder. If the images move, you only need to enter the new path in the Input and Output folders of your SimpleIndex configuration files to make your document management system work in the new location.

5.9.6 File Type Field

This field stores the file extension for each file. It is designed to be used when storing files as binary objects to allow SimpleIndex to determine what type of file the data represents so it can be displayed in the correct viewer.

5.9.7 Rename files in Update mode

This option will cause saved images in *Update* mode to be moved from the *Input* folder to the *Output* folder, and renamed using the subfolder and filename determined by the *Index* tab settings.

This makes it possible to do a variety of 2-stage indexing processes. Some examples are:

- Scan and create multi-page files with separator sheets, then index and rename those files with *Update* mode.
- Use scheduled OCR to automatically index fields and *Update* mode to correct OCR mistakes and move files to their destination
- Keep files in a temporary location during processing and move to a production server once indexing is complete

5.9.8 Skip Insert if output file exists

When you scan using the same configuration with the same index values, images are appended to the existing files. In most cases you do not want another record created in the database for the same file. Check this box to prevent these duplicate records from being created.

5.9.9 Store files as binary objects

Check this option to store the file data in the database field defined in the *Output File Field* (5.9.5), instead of the default behavior which is to save the path to the external file in this field. This allows all data to be stored within the database server without the need for separate files on the network.

Use the *File Type Field* setting (5.9.6) to indicate the file type for documents stored in the database. In *Retrieval* and *Update* modes this is used to determine the proper viewer to display the file in.

5.9.10 Database Field Name

Select the database fields that correspond to the fields you define under the *Index* tab. If there is no corresponding database field then leave this value blank.

5.9.11 Editable

This option is only used in *Update* mode. For each field, select this option if you want to allow the user to edit the values in this field. Leave it unchecked if you want to use the existing values for reference or file naming only and not allow the user to modify its value.

5.9.12 Filter

This option allows you to define default search criteria for *Retrieval* and *Update* modes. Whenever the search screen is displayed, the values entered here is displayed in the search criteria for that field. This makes it possible to add default filters to automatically search a certain subset of documents, or make it easier to perform searches by partially filling search fields.

5.9.13 Revision Field/Level

The *Revision Field* is used to indicate different queues that can be used for different types of processing. In Insert mode, the *Revision Level* value you enter is stored in the selected field. In Update mode, the user retrieves only images that match the selected *Revision Level*, and this value is incremented by 1 whenever the user saves an index value using the Save Index button.

By incrementing the value of the *Revision Level*, it is possible to tell which stage of processing each image is in. Typically, scanners will insert records with a *Revision Level* of 0. Indexers then update these records with the field information and increment the level to 1. Double-key indexers

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or QC reviewers finally update the level to 2, indicating that processing is complete. Database stored procedures may then be implemented to move records with a level of 2 to a table on a production server if necessary.

IMPORTANT! The Revision Field must be defined as a Character data type and not an Integer!

When used in *Update mode*, SimpleIndex “checks out” each batch to the current user by setting the *Revision Field* temporarily to the user’s ID, preventing the records from showing up in another user’s batches. For this reason, the *Revision Field* must be a multi-character data type with sufficient length to store the User ID.

5.9.14 Full Text OCR Field

If using *Insert mode*, this setting allows you to specify the name of a long text of memo field to use to store the full text OCR results. This will associate the image file and index information with the text of the document inside your database, making full text search possible.

5.9.15 Page Count Field

If using *Insert mode*, this setting allows you to specify the name of a number field to use to store the page count for each file.

5.10 Advanced Indexing Options

Advanced Indexing Options

Batch & Indexing

Run job until input folder is empty

Remove empty subfolders after processing

Save job file after each batch

Stop pre-index batch if required field is missing

Stop forwarding values at end of each input file

Go to first file on Save All

File Naming

Saved Region Filename: Region

Replace invalid filename characters (*?|\<>) with: .

Prompt before appending to existing files

Export Zone OCR data to text files

PDF Encryption/Decryption Password

Password: []

Confirm: []

Use password from user logon

Encrypt PDF on Export

Required Documents Auditing Field

None

Format all valid dates using this pattern

[]

Forward this field value to next batch

None

Substitute this value when a field is empty in an unattended batch. Enter DEFAULT to create a valid Date or Number for these field types.

DEFAULT

Database Comptability

Allow spaces in field names

Disable max rows in database queries

Use streams for binary database objects

Date delimiter

OK Cancel

Click the *Advanced Options* button at the bottom of the options screen to access these settings. Advanced options are used mostly in special circumstances; most job configurations will not require modifying these settings.

5.10.1 Batch & Indexing

5.10.1.1 Run job until input folder is empty

When running a job on a timer loop, this option will stop the timed processing once all files in the input folder have been processed. Useful for processing very large folders in several smaller batches, or for processing several multi-page files as individual batches.

5.10.1.2 Remove empty subfolders after processing

Automatically deletes empty folders after the files have been processed. Only applicable when the *Process Subfolders* option is selected.

5.10.1.3 Save job file after each batch

Automatically re-saves the configuration file at the end of each batch. This is used to preserve *Autonumber* field values and the *Last Batch Time* setting between sessions.

5.10.1.4 Stop pre-index batch if required field is missing

If a live user is present during a pre-indexed batch process, this option will stop the export and let the user fill in any required fields that are blank. You should not check this option with jobs running unattended (8.3).

5.10.1.5 Stop forwarding values at end of each input file

When processing several multi-page input files, document-level indexes usually apply to a single file. If OCR or Barcode recognition fails on a file, incorrect index values may be carried forward from the previous file if the *Forward* (5.4.3.7) option is checked. Check this option to clear index values at the end of each document. This option is valid only when processing multi-page images with the *Split multi-page input files* (5.3.4.6) option selected.

5.10.1.6 Go to first file on Save All

When this option is selected, clicking the *Save All* button (7.2.4.6) will return the user to the first file in the batch before saving all index values. When unchecked, saving starts at the currently selected file and proceeds forward from there.

5.10.1.7 Required documents Auditing Field

This option is very useful when scanning batches that have several specific document types that must be present in each. A typical example of this is a front desk scanner in a Doctor's reception area that collects and scans the medical history, insurance and other required documents for each patient.

By selecting a *List* field (5.4.3.1.7) in this option, the form below will appear upon completion of the batch. Items in the list that are present are listed in green, while missing files are listed in red. A *Scan* button is present to allow the user to automatically scan and index the missing file.

User Name	Company	Location	Patient Number
Aaron	HS	BARNWELL	2342512

Audit Field Values	Reason Value Not Present
Doc Type 1	Scan [Dropdown]
Doc Type 2	Scan [Dropdown]
Doc Type 3	Scan [Dropdown]
Doc Type 4	Scan [Dropdown]
Doc Type 5	Scan [Dropdown]

Buttons: Cancel, Finish

With this option selected the user must scan and index an image for each value in the field list or enter a justification for why the file is not present.

5.10.1.8 Format all valid dates using this pattern

The format pattern selected here is used to reformat all valid dates regardless of the field type. This is useful for reformatting dates extracted from OCR text or barcodes.

5.10.1.9 Forward this field value to next batch

Specify a field whose value does not change between batches here. The value for this field from the previous batch will be the default value for the next batch.

5.10.2 File Naming

The following options determine the file naming behavior in various scenarios.

5.10.2.1 Substitute this value when a field is empty

If a field used to generate the filename is missing, this text is substituted for the blank value. This makes it easy to locate files where one or more fields are not recognized automatically by OCR or barcode recognition in an unattended process (8.3).

If you are exporting field values to a database you must be sure that this value is valid for all field types you are exporting to. The initial value of "DEFAULT" will substitute the following values for the three basic data types:

- Numbers 0
- Dates 2000-01-01
- String/Char MISSING

To configure individual values for empty fields, use a *Fixed* field (5.4.3.1.6) instead. For example, to configure a 3-digit OCR field to use the value "999" if there is no result, use the following settings:

Field	Type	Template
Field #1	OCR	###
Field #2	Fixed	%FIELD1 999%

Use Field #2 to generate the filename or export the correct value to a database.

5.10.2.2 Saved Region Filename

You can use an OMR zone (5.4.3.1.3) to indicate a region to be captured to a separate file. The value from this setting is appended to the name of the exported file the region corresponds to. For example if the exported file is "ABC.TIF" and the region value is "Signature" and the field separator is "_", the region file will be saved to "ABC_Signature.TIF".

5.10.2.3 Prompt before appending to existing files

Check this box to prompt the user before any existing file is modified during the export process. When unchecked, existing files are appended to automatically without notifying the user.

5.10.2.4 Export Zone OCR data to text files

By default only full-page OCR text is output to separate files during export. Select this option to have the text from Zone OCR output to text files.

5.10.2.5 Replace invalid filename characters

When a field value used to generate folder or filenames contains characters not allowed in filenames (* ? | < > / \) the character(s) entered here will replace the invalid ones. This may be left blank.

5.10.3 PDF Encryption/Decryption

Use the following options when importing or exporting password-protected PDF file.

5.10.3.1 Password

The password entered here is used to decrypt password-protected PDF files when importing and processing. The password will also be used to encrypt PDF files on export if that option is select.

5.10.3.2 Use password from user logon

When working with PDF files that have different passwords, this option is useful as it allows the user to enter a password when signing on to SimpleIndex and have that password used for that session. All files processed in a single batch must have the same password, but this option allows you to quickly change the password between batches without having to edit the job options.

5.10.3.3 Encrypt PDF on Export

All PDF files are encrypted with the current password when the batch is exported.

5.10.4 Database Compatibility

5.10.4.1 Allow spaces in field names

Databases that support spaces in field and table names use brackets to enclose these names. Other databases do not use brackets. This setting is set automatically when you use the Select a Data Source wizard (5.9.2).

5.10.4.2 Disable max rows in database queries

Some databases do not allow query size to be limited using the *MaxRows* parameter. An example of this is FileMaker. Check this option to disable query sizing.

5.10.4.3 Use streams for binary database objects

Changes how binary objects are stored and retrieved from the database. Use the default for this option (selected) unless told to change it by support.

5.10.4.4 Date delimiter

This is used for compatibility in date conversions with different databases. Some databases use “#” to indicate dates, others use the single quote “ ’ “. This setting is set automatically when you use the Select a Data Source wizard (5.9.2).

6 How to Section

There are several common scenarios whose configurations may not be obvious from a list of options. This section is provided to describe some of these scenarios and the configuration settings required to perform these functions. For more how-to documents, please visit the FAQ page on www.SimpleIndex.com.

6.1 Creating a document management system with SimpleIndex and SimpleSearch

Creating a standalone or shared document management database with SimpleIndex is easy. SimpleIndex is designed to work with any database by simply mapping the index fields in SimpleIndex to fields in the database. A key field is used to link processed files to the database record.

When scanning or importing, SimpleIndex creates new records in the database. SimpleSearch uses the same configuration settings in *Retrieval* mode (5.9.3.4) to search the index values and view the linked files (7.5).

SimpleIndex comes with an MS Access database that can be configured automatically. You can use any custom database as your server platform, but with these you must configure the field mappings manually – other than that the process is the same.

To use the built-in database:

1. Create a job configuration that imports files, indexes them and saves them to your preferred folders and filenames.
2. Go to the *Database* options (5.9) and run the *Create Blank Database* wizard (5.9.2.1). Browse to the folder that you want to store the database in and click Save. If you want to share this database, be sure to save it in a network shared folder available to all users.
3. Change the database mode to *Insert New Records* (5.9.3.2).
4. Save the configuration file (7.4.1.6).
5. Run some jobs to populate the database with files to search.

6. Create a SimpleSearch configuration by selecting *Retrieval* mode (5.9.3.4).
7. Save the SimpleSearch configuration with a different name to distinguish it from the import job.

Once you have created both an *Insert* and *Retrieval* mode configuration, you may use these to add documents and search the database respectively.

6.2 How to create searchable CDs and DVDs

SimpleIndex has the ability to copy all of your images, index data and SimpleIndex itself to a CD or DVD automatically, creating a searchable disc that can be archived or given to anyone to view on their PC. SimpleIndex does this using the *Media Wizard* (7.4.7.6).

The *Media Wizard* is useful for service bureaus that scan documents for many clients and companies scanning specific files to give to accountants, auditors, customers, etc. The *Media Wizard* lets the user search the CD with SimpleSearch for free, without the 30-day demo time limit. It is an easier and more flexible way for the user to find and access their documents.

The *Media Wizard* is only able to search a single disc at once – it is not designed to span multiple discs. If you have more images than fit on a single CD, the user will need to copy the files off of the CD and search them with a licensed copy of SimpleSearch.

6.3 How to use barcodes or blank pages to separate documents automatically

Creating multi-page files from single-page files makes indexing faster and easier. When indexing multi-page files, you only need to look at the first page to find the index values, and the next file is shown automatically when *Save Index* (7.2.4.5) is clicked. With single page files you must flip through each page until you get to the first page of the next document. It is also possible to perform OCR and barcode recognition only on the first page of each document, saving much processing time.

Creating multi-page files can be automated using barcode separator sheets or blank pages. Blank page separation works only with 1-sided documents, since duplex scanning produces blank pages when no information is on the back page. Barcode separators work with any document since they use a

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unique barcode value to indicate document breaks. These can be created with *SimpleCoversheet* (7.3.20). Coversheets can be printed in large quantities and quickly inserted between documents prior to scanning.

SimpleIndex uses an *Autonumber* field (5.4.3.1.1) to increment a numeric field each time a barcode separator or blank page is detected. This is used to create numbered, multi-page files in a temporary *Output* folder (5.3.1.2) location.

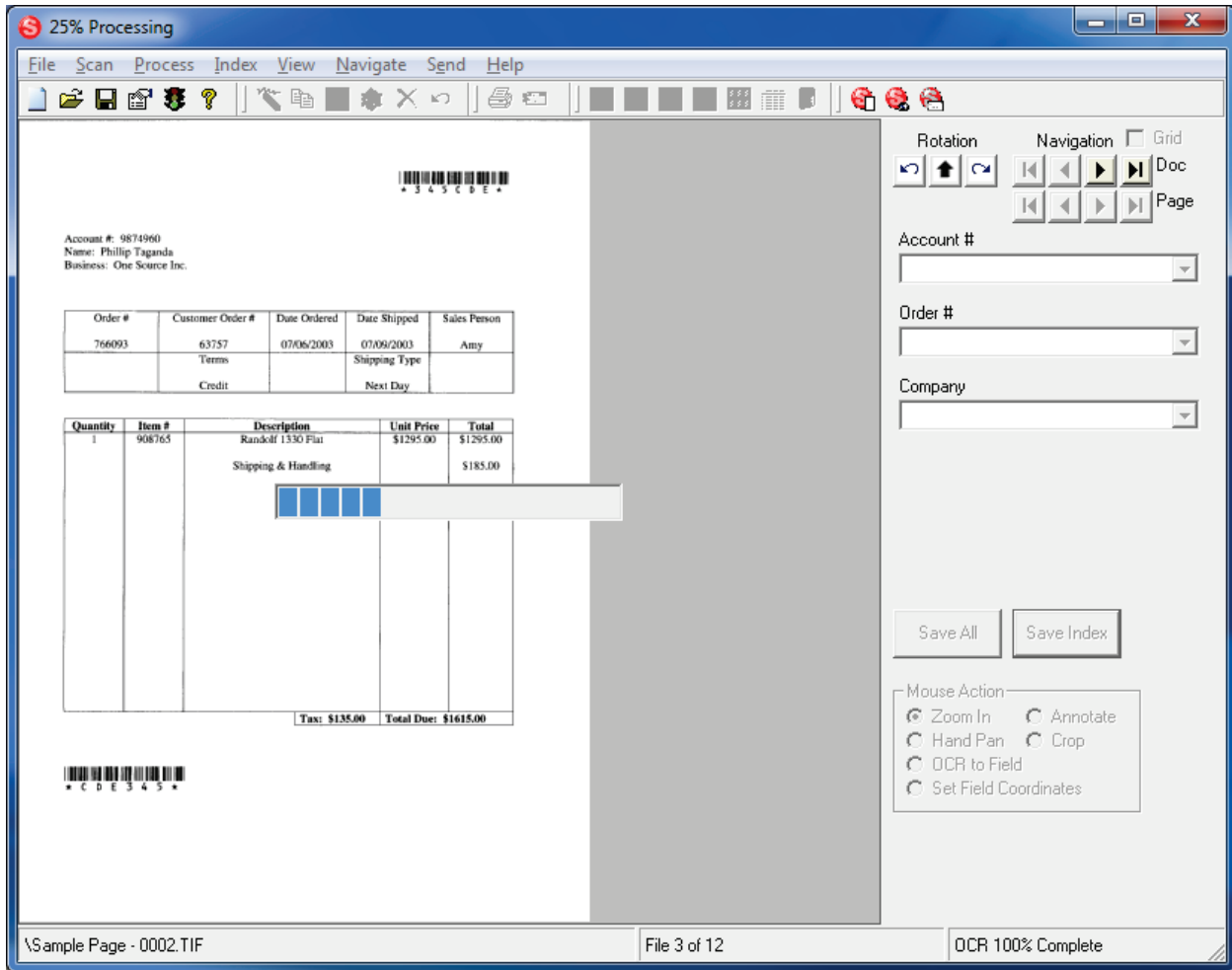
A second configuration uses the temporary folder as its *Input* folder (5.3.1.1) and imports the multi-page files for indexing. The *Input Source* (5.3.4.1) should be set to “Folder” and *Split multi-page input files* (5.3.4.6) must be disabled. Configure this job with the desired index fields and use it to perform the data entry and output file naming.

It is possible to run both jobs sequentially by putting the path to the second job file in the *Post-Process* setting (5.3.2) for the first. When the first job is run files are scanned, barcodes read and multi-page files created. Immediately the second job runs in the same window, displaying the multi-page files to the user for indexing.

If you wish to use a database, configure the scan configuration using *Insert* mode (5.9.3.2) and the indexing config in *Update* mode (5.9.3.3). Check the *Rename files in Update mode* option (5.9.7) if you want to reorganize the file structure as you index.

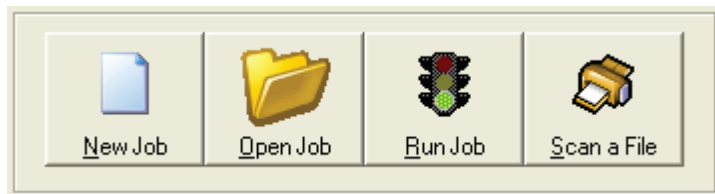
7 Running Jobs

This section describes the steps that the operator must take to scan, process, index and release a batch of documents, and the options available at each of these stages. By becoming familiar with these options, the scanner operator can increase the efficiency and quality of their work.



7.1 Start Screen

When you start SimpleIndex, these 4 buttons give quick and obvious access to the most important functions.



The *Run Job* button is disabled unless you create a *New Job* or open and existing job file. Clicking the *Run Job* button will start a new batch process (7.2). You can quickly scan a single multi-page file without a batch job by clicking *Scan a File*.

7.2 Batch Processing Stages & Options

This section describes the steps involved in batch processing, how to initiate each step and the manual processing options available to the user during a batch.

7.2.1 Start batch

Start the batch by pressing the *Run Job* button (green traffic light icon) on the toolbar.

7.2.2 Input files

Depending on the *Input Source* (5.3.4.1), scanning will start automatically or images are moved from the *Input* folder to a temporary processing folder.

7.2.3 Automatic processing

Image clean-up, OCR and barcode recognition is performed automatically. If the batch is large, OCR processing may take several minutes. In this case the user may do work in another application while processing and return to the batch once processing is finished.

7.2.4 Manual indexing & image verification

Each image is displayed to the user and they are able to enter index information or correct the values from OCR or barcode recognition. The following options are available during this stage:

7.2.4.1 Menu and Toolbar Options

A variety of options are available from the toolbar and menus to perform image correction, rescanning, viewing, sending and QC review of documents. Please see the following sections for details on these.

7.2.4.2 Rotate Left, Right and Auto

If the page is sideways or upside down use these buttons to rotate the page until it is oriented correctly. Images are saved automatically in new orientation.



Black and White, TIFF images may be rotated automatically by clicking the up arrow.

7.2.4.3 Document Navigation

Document navigation allows you to move from the current file to the next, previous, first or last file in the batch.



Changes to index fields are not saved when you use the document navigation buttons! Use the *Save Index* button to save changes to index fields and move to the next document automatically.

7.2.4.4 Page Navigation

Page buttons let you view pages within multi-page TIFF images. Page buttons are disabled for single page files and non-TIFF files.

You can view all pages in a thumbnail view by clicking the *Thumbnails* button (7.3.19). Double-clicking a thumbnail displays the full page.

Use the *OCR Text* view (7.4.5.7) to view and edit the recognized text for the current file.

7.2.4.5 Save Index

Saves the current values as the index for the current image and moves to the next file. When the last file is reached, *Save Index* will prompt the user to export the batch.

7.2.4.6 Save All

Has the effect of clicking *Save Index* repeatedly until the end of the batch is reached. This allows you to index an entire batch with the current values in a single click. This is particularly useful for applying index values that are calculated from previous images using the *Forward* option (5.4.3.7).

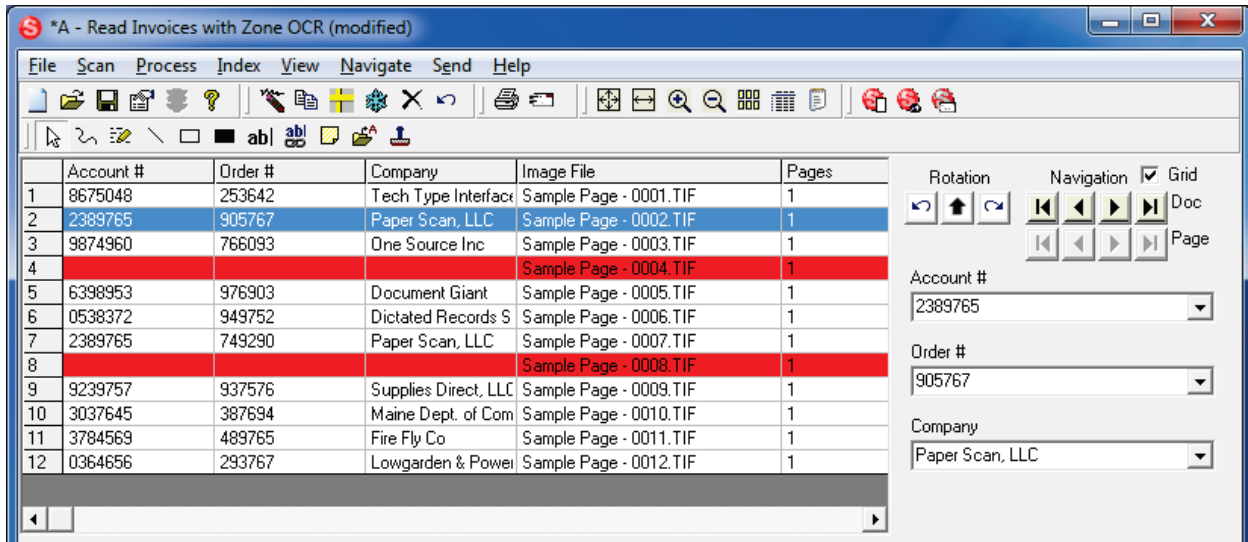
7.2.4.7 Image File Name / Browse / Open

The Image File Name field displays the filename for the current image. This field can only be edited in *Update* mode.

The *Open* button opens the current file in its default viewer, allowing you to view files not supported by SimpleIndex or perform advanced image editing.

In *Update* mode, the *Browse* button will display an open file dialog that allows the user to select another image file to replace the current one.

7.2.5 Grid View



The *Grid View* allows you to view all of the documents in the batch and all of the captured index information. You can display any file by clicking the corresponding row in the grid. Double-click a record to hide the grid and display the file in the full window. In *Update* mode you may edit index data directly in the grid. Files marked for deletion are displayed in red.

7.2.6 Mouse Action Options

Depending on the option selected, SimpleIndex exhibits a different behavior when a selection rectangle is drawn on the image.

7.2.6.1 Zoom In

Zooms the image to the selection. Once you draw the zoom rectangle, the Hand Pan option is selected automatically.

7.2.6.2 Hand Pan

When the user holds down the mouse button on the image, the image scrolls automatically allowing the user to quickly move around the page.

7.2.6.3 OCR to Field

Performs OCR on the selected region, inserts the result into the current index field and moves the cursor to the next field. This makes it very quick and easy to read index information from the image manually when automatic processing is not an option.

7.2.6.4 Set Field Coordinates

Sets the X, Y, Width, and Height options under the OCR tab to the coordinates for the selection rectangle. This sets the OCR region for OCR fields, as well as the Zoom Locking (7.4.5.14) region for all field types. This

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will cause SimpleIndex to zoom in on the selected region whenever the corresponding field is selected.

Selecting this option will display the existing zones on the current image.

7.2.6.5 Annotate

Enables the annotation toolbar, allowing you to make a variety of markings on the document. Options include lines, boxes, text stamps and notes. Annotations can only be used with Black and White TIFF images. Annotations are saved separately from the image, and can be hidden to see the underlying image using the right-click menu. In the *Global Settings Wizard* it is possible to configure SimpleIndex to make annotations permanent (4.6.4.4) which is useful for redacting private information on documents.

7.2.6.6 Crop

Automatically crops the image to the selected region, discarding all image data outside the selection rectangle. If the wrong region is selected, the full image can be restored using the *Undo* toolbar button. Once *Save Index* is clicked, the image is permanently cropped and cannot be undone.

7.2.7 Document presence auditing

If an *Audit Field* (5.10.2.4) is selected, the index field audit dialog will appear once all images have been indexed. The user is prompted to scan files not present in the batch or enter a justification for why the document is not present.

User Name	Company	Location	Patient Number
Aaron	HS	BARNWELL	2342512

Audit Field Values	Reason Value Not Present
Doc Type 1	Scan [Dropdown]
Doc Type 2	Scan [Dropdown]
Doc Type 3	Scan [Dropdown]
Doc Type 4	Scan [Dropdown]
Doc Type 5	Scan [Dropdown]

Buttons: Cancel, Finish

7.2.8 Export batch

Once all files have been indexed and the batch is audited, the files are exported. There are multiple steps in the export process, depending on the options you select.

7.2.8.1 Create export files

If multi-page files are used, the first step is to combine files in the current batch with the same index settings into multi-page files.

7.2.8.2 Imprint files

If the *Imprint* option (5.7) is selected, automatic watermarking of TIFF and PDF files will occur at this point in the process.

7.2.8.3 Move files

When multi-page files are used, the last step of the export process is to move files from the temporary processing folder to the *Output* folder (5.3.1.2). Depending on the *Existing Files* setting, pages from the current batch will replace existing files or are appended to the start or end of the document. If the *Add bookmarks to PDF files* option (5.4.5.4) is selected, pages are inserted into the matching bookmarked sections in any existing file.

By performing the multi-page file export and move operations in two steps, SimpleIndex greatly improves performance when exporting to large, multi-page files on a network drive.

7.3 Toolbar Options

7.3.1 New

Displays the *Job Settings Configuration* wizard to create a new job configuration.

7.3.2 Save As...

Displays the *Save Job Configuration* dialog to save the current job settings to an SIC file.

7.3.3 Open

Displays the *Open Job Configuration* dialog box to open a new job configuration file.

7.3.4 Options

Displays the *Job Options* screen to set job configuration parameters.

7.3.5 Run Job

Begins processing the current job file.

7.3.6 Help

Displays this manual file in Adobe Acrobat.

7.3.7 Rescan

Replaces the current page with a newly scanned image.

7.3.8 Duplicate

Creates the desired number of duplicate images with the same image and index values as the current image. Can also be used in conjunction with *Rescan* to add 1 or more pages to the batch after processing is complete.

7.3.9 Deskew

Performs automatic deskewing on the selected images to straighten the page if it was skewed when it went through the scanner.

7.3.10 Despeckle

Performs automatic despeckling on the selected images to remove any stray spots or “snow” that might appear on the image when it is scanned.

7.3.11 Delete

Marks the selected images and associated image information for deletion. In *Update* mode, files and index information are deleted immediately. Otherwise, files are not deleted until the batch is exported.

7.3.12 Undo

Reverts the index fields to the values present before they were modified by the user. Also reverts any changes to the image file, such as redaction and cropping.

7.3.13 Print

Prints the selected files. File must be able to preview in SimpleIndex to be printed. PDF files and MS Office documents can also be printed from their respective viewer plug-ins. When printing multiple PDF files it is necessary to click through a dialog after each file prints. For other file types, use the *Open* button (7.2.4.7) to open the file in its default viewer and print it from there.

7.3.14 E-Mail

E-mails the selected files using the default MAPI email client. You must have an email application such as Outlook, Outlook Express, Eudora or Thunderbird installed and configured for your email account. It does not work with webmail.

7.3.15 Fit Page

Automatically zooms the current image to fit entirely in the display window.

7.3.16 Fit Width

Automatically zooms the current image to fit its width in the display window.

7.3.17 Zoom In

Increases the zoom level of the current image so more detail is shown.

7.3.18 Zoom Out

Decreases the zoom level of the current image so less detail is shown.

7.3.19 Thumbnails

Displays image files in thumbnail view to let you preview pages within multi-page files. Double-clicking a page shows it in the full page view. When thumbnail view is selected, Despeckle, Deskew, Rotate and Delete will apply to all currently selected thumbnail pages. It is also possible to reorder pages in thumbnail view by dragging and dropping thumbnails.

7.3.20 Image Grid

Displays the *Image Grid* (7.2.5) so you can see all of the files and index field data in the batch.

7.3.21 OCR Text

Displays the OCR text for the current file, including full page OCR and data from Zone OCR.

7.3.22 SimpleCoversheet

Launches SimpleCoversheet to print barcode separator sheets for automatic indexing.

7.3.23 SimpleQC

Launches SimpleQC and displays the current batch in the SimpleQC thumbnail viewer.

7.3.24 SimpleSend

Launches SimpleSend for secure FTP and email uploading of documents.

7.4 Menu Options

This section outlines the options available through the SimpleIndex menus. Most of the menu options do the same thing as toolbar buttons and so their descriptions refer to those buttons. Options not available elsewhere are described in detail.

7.4.1 File Menu

7.4.1.1 New Job Configuration

Creates a new job configuration using the *Job Settings Wizard*.

7.4.1.2 Open

Displays the *Open Job Configuration* dialog box to open a new job configuration file.

7.4.1.3 Open URL

Allows you to enter the URL for a configuration file on a website and open it directly from there. This lets administrators centrally manage configuration files on a website and even provide a web page with links to a variety of scan jobs.

To host SIC files on a website it is necessary to add the SIC file type to the list of MIME types on your server. See the server documentation for details. It is also possible to save configuration files as XML to avoid MIME type issues.

7.4.1.4 Open Recent

Displays the last 4 configuration files opened.

7.4.1.5 Save

Saves the current job configuration without displaying the *Save As* dialog.

7.4.1.6 Save As...

Displays the *Save As* job configuration dialog to save the current job settings to file.

7.4.1.7 Close

Close the current job file, ending any job in progress.

7.4.1.8 File Viewer

The *File Viewer* options let you view and edit single files with SimpleIndex without running a batch job.

7.4.1.9 Run Job

Creates a new batch and begins processing the current job file.

7.4.1.10 End Job

Aborts the job in progress. Images from the current batch are deleted or moved to the *Backup* folder (5.3.1.4) if configured.

7.4.1.11 Resume Job

If SimpleIndex is restarted due to an error during processing, use this option to resume processing the last batch without rescanning. You will be shown an *Open* dialog displaying the temporary batch process folder or the *Backup* folder (5.3.1.4) if no batches are in the temp folder. Select the folder that corresponds to the date and time of the aborted batch to re-process the images in that batch.

7.4.1.12 Schedule Job

Allows you to schedule a SimpleIndex job (8.3) to run at a future date or a recurring period of time.

7.4.1.13 Job Options

Displays the *Job Options* screen to edit the current job configuration settings.

7.4.1.14 Job Settings Wizard

Displays the *Job Settings Wizard* to edit the job current configuration settings using the wizard.

7.4.1.15 Global Settings Wizard

Displays the *Global Settings Wizard* (4.5) to set default folders and security settings.

7.4.1.16 SimpleCoversheet

Launches the SimpleCoversheet barcode coversheet designer application.

7.4.1.17 SimpleQC

Launches the SimpleQC viewer. If a batch is in progress, automatically opens SimpleQC in the Temp folder, displaying thumbnails for the images in the current batch. If no batch is in progress, the *Output* folder is displayed by default.

7.4.1.18 SimpleSend

Launches the SimpleSend secure FTP and email transfer application.

7.4.1.19 Exit

This manual requires the user to figure this one out for his/her self.

7.4.2 Scan Menu

7.4.2.1 Use TWAIN Driver

Check this option to use the TWAIN scanner driver. TWAIN is compatible with more scanners, but is slower than ISIS for most sheetfed document scanners. It is recommended that you use ISIS if your scanner supports it.

7.4.2.2 Use ISIS Driver

Check this option to use the ISIS scanner driver instead of the default TWAIN. ISIS scanning is faster and more stable than TWAIN scanning, particularly for high-speed document scanners. An ISIS license is required to use this option.

ISIS scanning is recommended for use with any document scanner that supports it. With ISIS, all scanner settings are saved to your SimpleIndex job file. This lets you specify job-specific scanner settings that load automatically when you open a job file.

7.4.2.3 Select Scanner

Displays the Select TWAIN or ISIS Source dialog, allowing you to select the scanner you wish to use with your SimpleIndex job.

7.4.2.4 Display Scanner Settings

Displays the TWAIN or ISIS settings dialog, allowing you to modify the resolution, page size, thresholds and other scanner settings available with your model scanner.

ISIS scanner settings are saved to your job configuration file. Save the job configuration to save the new settings and use them whenever the current job is opened.

Most TWAIN scanners will “remember” the last settings used each time a new scan is performed. You should only need to modify the settings when scanning different types of documents.

Scanners that use the Window Imaging (WIA) TWAIN driver do not remember settings. For these scanners you should check the *Display*

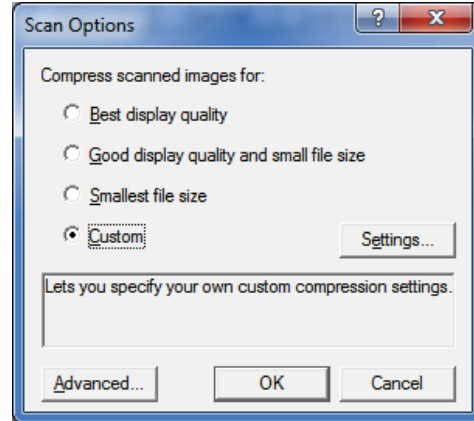
Settings Before Scan (7.4.2.5) option to show the scanner settings before each new scan.

7.4.2.5 Compression

7.4.2.5.1 Recompress Images

Check this option to recompress both scanned and imported images that don't match the compression settings specified in the *Compression Options*.

Recompression takes place on export and may slow down processing significantly depending on the source and output compression settings.



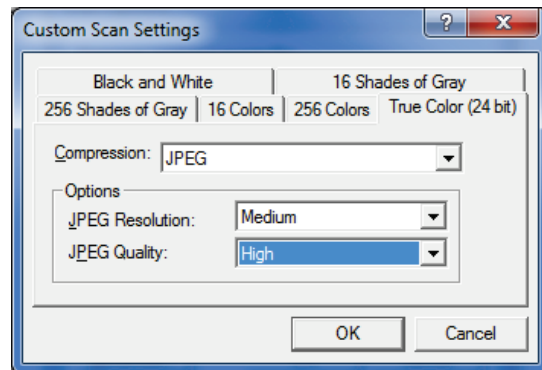
7.4.2.5.2 Set JPEG Quality

Manually set the JPEG quality setting to an exact value (1-100). More detail is retained with a higher quality setting, but the file size is also larger.

7.4.2.5.3 Set Compression Options

Displays the compression settings window. The compression settings are applied anytime an image is saved. This happens automatically when:

- Scanning images
- Importing multi-page TIFF files when the *Split multi-page input files* option (5.3.4.6) is selected.
- PDF to TIFF conversion (5.3.4.7)
- Exporting image files to PDF



By default, all black and white images are compressed with Group IV (2D) compression, which minimizes file size without affecting image quality. Default settings for color images will display as JPEG Medium resolution, High Quality. This corresponds to a quality setting of 90 on a 1-100 scale. This setting provides a good combination of small file size and legibility with document images.

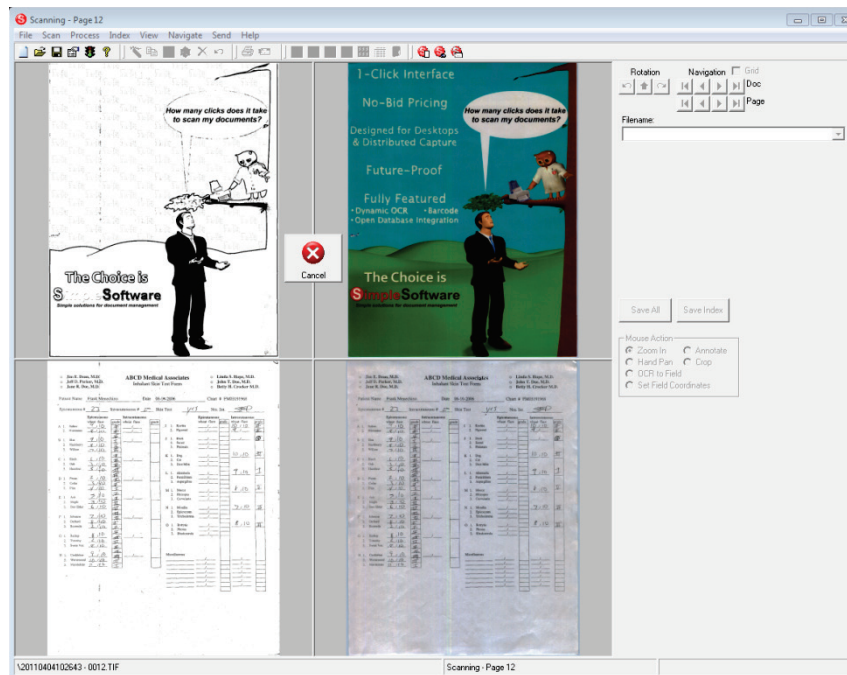
Grayscale and Color images can be compressed with JPEG or LZW, or left uncompressed. When scanning to TIFF image files, LZW compression provides maximum compatibility. JPEG compression may be used with TIFF images to dramatically reduce file size, but these files will not open in

some viewers (most notably Windows Picture and Fax viewer). Newer viewers tend to support multi-page TIFF with JPEG compression, but we recommend using PDF for color, multi-page files for minimum file size and maximum compatibility.

When you click the *Advanced...* button, you have the option to select Native or Memory transfer mode for scanning. Native mode is the default setting and is faster. Memory mode can solve compatibility issues with some scanners.

7.4.2.6 Set # of Page Windows

When scanning in ISIS mode, multiple pages can be displayed on the screen at once (up to 9). This option is not available in TWAIN mode. This is useful for viewing both sides of a duplex scan or multiple image streams at once.



7.4.2.7 Display Settings Before Scan

When this menu option is checked, the scanner settings dialog are automatically displayed before each new scan.

7.4.2.8 Display Scan More Prompt

This checkable menu item causes SimpleIndex to ask the user if s/he wants to scan more pages into the current batch. This helps if the scanner's hopper is not big enough for all the pages, or if a jam interrupts scanning before the batch is complete.

7.4.2.9 Manually Duplex

Use this option to scan 2-sided (duplex) documents on a 1-sided (simplex) scanner. When checked, the user is prompted to scan the front side of the batch first and then the back. When the batch is processed the pages will appear in the correct order.

7.4.2.10 Split Pages Vertically

Automatically splits images vertically as they are scanned. This is very useful for scanning books on a flatbed scanner.

7.4.2.11 Split Pages Horizontally

Automatically splits images horizontally after they are scanned. Again, useful for scanning books on a flatbed scanner.

7.4.2.12 Magazine Scan

Use this option to scan booklets or magazines that have 2 pages printed side by side and folded down the middle without cutting. When this option is checked, pages are split down the middle, automatically rotated and reordered so each page is a single image in the proper order and orientation.

7.4.2.13 Scan to Multi-Page File

Lets you scan a document and save it to a single multi-page TIFF or PDF file. Useful for scanning example files for OCR zones (5.6.2.3), or for ad-hoc scanning of single documents without a batch configuration.

7.4.2.14 Scan to Input Folder

This option lets you scan images to sequentially numbered files in the *Input* folder (5.3.1.1) for later processing.

Normally, scanning is done automatically as the first stage in processing. Certain applications may run faster by manually initiating the scanning in this way instead of automatically processing images after scanning.

7.4.2.15 Add Pages to Batch

Allows you to add more pages to the current batch after scanning has finished without rescanning or creating a new batch. All pages in the batch must be re-processed, losing any manual indexing or automatic processing like OCR and barcode recognition. This option should only be used to add pages to a manually indexed batch when a paper jam or other scanner issue causes scanning to end prematurely.

7.4.2.16 Rescan Page

When a batch is in progress, you may use this option to replace the current page with a newly scanned image.

7.4.2.17 Scan This File

Scans the current file. Used only in *Update* mode (5.9.3.3) to scan and attach images to existing records in a database.

Use *Match and Attach* mode (5.9.3.5) to perform this task automatically with batches of documents.

7.4.3 Process Menu

7.4.3.1 Process Selected Files

Performs OCR, barcode recognition and other automatic processes on the current page. Useful for testing OCR zones on example images.

7.4.3.2 Reprocess Batch

Reprocesses all of the images in the current batch, without reading new images from the scanner or *Input* folder.

7.4.3.3 OCR to Word/HTML/PDF

Performs full-page OCR on the current document and lets you export to MS Word, HTML, Text or PDF.

7.4.3.4 Test Barcodes

Reads the current image with all barcode detection options available and reports all detected barcodes along with their coordinates, type and checksum data.

7.4.3.5 Rotate Left

Performs the same function as the *Rotate Left* button (7.2.4.2).

7.4.3.6 Rotate Right

Performs the same function as the *Rotate Right* button (7.2.4.2).

7.4.3.7 Auto-Rotate

Performs the same function as the *Auto-Rotate* button (7.2.4.2).

7.4.3.8 Deskew Page

Performs the same function as the *Deskew* toolbar button (7.3.9).

7.4.3.9 Despeckle Page

Performs the same function as the *Despeckle* toolbar button (7.3.10).

7.4.3.10 Enable Processing Log

Select this menu option to enable the *Processing Log*, which causes an extended log file called “Process_YYYY-MM-DD.txt” to be created in your *Log* folder (5.3.1.3). A new log is created for each day. This file contains extensive information on the processing steps taking place during each SimpleIndex job.

If you have *Enable Processing Log* checked when you create a SimpleIndex service (8.3.3), the service is configured to create a processing log as it runs. To enable this after the service has been created you must delete and re-create the service.

The *Processing Log* is particularly useful for:

- Diagnosing issues with unattended processing
- Viewing raw zone OCR results prior to template matching
- Working with Simple Software support

7.4.3.11 View Processing Log

Opens the current *Processing Log* in Notepad.

7.4.4 Index Menu

7.4.4.1 Save Index Values

Performs the same function as the *Save Index* button (7.2.4.5).

7.4.4.2 Save All with Current Values

Performs the same function as the *Save All* button (7.2.4.6).

7.4.4.3 Find in List

Searches the for the current field to find a specific value. This is useful when a list field is very long and items are not easily found alphabetically. The search string is matched against any part of the list value. The keyboard shortcut Control+F can be used to quickly access this function. If there are multiple matches in the list you can repeat the find to locate subsequent matches.

7.4.4.4 Refresh Lists

Reloads all drop-down list fields from the database or text file. Lets you add records to the list during batch processing and refresh the list to use it as an index value in a list field.

7.4.4.5 Mark/Unmark for Deletion

Performs the same function as the *Delete* toolbar button (7.3.11).

7.4.4.6 Duplicate Page

Performs the same function as the *Duplicate* toolbar button (7.3.8).

7.4.4.7 Undo Changes

Performs the same function as the *Undo* toolbar button (7.3.12).

7.4.5 View Menu

7.4.5.1 Actual Size

View the actual pixels of the image in 1:1 ratio.

7.4.5.2 Full Page

Fit the entire page on the screen (7.3.15).

7.4.5.3 Page Width

Fit the width of the page on the screen (7.3.16).

7.4.5.4 Image Thumbnails

Performs the same function as the *Thumbnails* toolbar button (7.3.19).

7.4.5.5 Batch Thumbnails

Performs the same function as the *SimpleQC* toolbar button (7.3.23).

7.4.5.6 Image Grid

Displays or hides the *Grid* view (7.2.5).

7.4.5.7 OCR Text

When this option is selected, OCR text for each file is displayed in the SimpleIndex window instead of the original file. This includes text from full-page OCR, existing text files and text extracted from MS Office and PDF files. Zone OCR text is not displayed. The OCR text may be edited to correct mistakes. Changes are saved when the *Save Index* button (7.2.4.5) is clicked.

7.4.5.8 Input Folder

Opens the *Input* folder (5.3.1.1) for the current job in Windows Explorer.

7.4.5.9 Processing Folder

Opens the current processing folder. For most jobs this folder is:
c:\Documents and Settings\CurrentUser\Local Settings\Temp\SimpleIndex

7.4.5.10 Output Folder

Opens the *Output* folder (5.3.1.2) for the current job in Windows Explorer.

7.4.5.11 Log Folder

Opens the *Log* folder (5.3.1.3) for the current job in Windows Explorer.

7.4.5.12 Backup Folder

Opens the *Backup* folder (5.3.1.4) for the current job in Windows Explorer.

7.4.5.13 Annotation Toolbar

Use this option to show or hide the annotation toolbar when TIFF images are displayed. When annotations are not used, hiding the toolbar gives you a little extra room to view images.

7.4.5.14 Enable Zoom Locking

This checkable option enables or disables the automatic zooming feature of SimpleIndex, configured in the *Zones & OCR* settings (5.6). Automatic zooming causes the display to zoom in on a certain part of the image whenever a field is selected. Some users may prefer this option, others may not. This menu option lets you turn it on and off.

7.4.6 Navigate Menu

The options in the *Navigate* menu perform the same functions as the *Document Navigation* and *Page Navigation* buttons on the main screen. Only the additional navigation functions are listed here.

7.4.6.1 Next Empty Field

This takes you to the next page in the batch that has a required index field that is blank. This lets you quickly find missing index values within a batch.

7.4.6.2 Next Deleted Page

Takes you to the next page in the batch that is marked for deletion.

7.4.6.3 Next Unsaved Page

Takes you to the next page in the batch with unsaved index values. Helpful for finding any unfinished files in a batch that is ready to export.

7.4.6.4 Jump to Document

Allows you to display a specific file within the batch immediately, without cycling through the page or document buttons. The status bar on the bottom of the SimpleIndex window displays the current file number and total number of files in the batch.

7.4.7 Send Menu

7.4.7.1 Select All Files

Selects all files in the current batch.

7.4.7.2 E-Mail Selected Files

Performs the same function as the *Email* toolbar button (7.3.14).

7.4.7.3 Print Selected Files

Prints the current image file. If the *Show Print Settings* menu option is checked, the print settings are displayed to allow you to select a printer, page range and other settings. PDF files may be printed from the Acrobat Reader plug-in. For OLE and other file types, use the *Open* button to open the file in its default viewer and print from there.

7.4.7.4 Export Selected Files

This option is only enabled in *Retrieval* mode (5.9.3.4). It allows you to save all the files from the current search results to another folder automatically. Useful for sending several related documents to another person at once.

7.4.7.5 Export Index Values

This option is only enabled in *Retrieval* mode (5.9.3.4). It allows you to save the index information from all the files in the current batch to a CSV file. Useful for creating reports or spreadsheets based on values from search results.

7.4.7.6 Media Wizard



The *Media Wizard* lets you copy a database and the image files associated with it to a temp folder for burning to a CD or DVD, or for copying to any other media or network location. The end product is a CD or DVD that automatically launches a start page when inserted. The start page contains links to a SimpleIndex demo installation as well as saved configuration files for searching and viewing the documents on the disc.

Searching images from a CD or DVD is free. The demo time limit is bypassed when running a *Retrieval* mode (5.9.3.4) configuration from a CD/DVD drive. Using a configuration from the hard drive or network will run SimpleIndex in Demo mode.

To enable installation of SimpleIndex from the CD/DVD, you must copy the SimpleIndex setup file to \CDFiles\Setup.exe in your program folder (default is c:\Program Files\SimpleIndex).

You may modify the Index.htm file or the autorun settings in the CDFiles folder to customize the disc with your own startup page. It is possible to have multimedia demos or custom programs run automatically when you insert the CD.

The *Media Wizard* performs the following tasks:

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1. Prompts the user to select a folder. This folder is a temporary folder that will hold all the files for the disc until they can be burned. Select a folder by browsing to it and clicking *Save*.
2. Copies the Access database used by the current job to the folder, saving it under the name "SimpleIndex.mdb". **This step will fail if your *Data Source* setting uses ODBC or OLEDB.** Your *Data Source* setting must be a path to a valid Access database.
3. Copies all of the images from the *Output* folder (5.3.1.2) to the selected folder. All files and subfolders are copied, even if their size is much larger than your media. When using the *Media Wizard* be sure that your *Output* folder is not larger than the capacity of your disc.
4. Saves several copies of the current configuration in *Retrieval* mode, replacing the *Input* folder (5.3.1.1), *Output* folder (5.3.1.2) and *Data Source* path (5.9.2) with "D:", "E:", etc., allowing the user to search the media no matter what drive letter their reader uses.
5. Copies all the files in your "CDFiles" folder to the selected CD folder. This includes an autorun program, startup web page and SimpleIndex installer. The web page contains links to the SimpleIndex installer, Access database and a batch file that detects the CD drive letter and launches the appropriate configuration file.

7.4.8 Help Menu

7.4.8.1 Manual

Opens the SimpleIndex Manual in Adobe Acrobat. You must have a PDF viewer installed on your computer to view the manual.

7.4.8.2 Getting Started

Displays the *Getting Started Guide* listing several basic tips on using SimpleIndex.

7.4.8.3 Setting Field Coordinates

Displays the field coordinates window to assist in setting OCR zones.

7.4.8.4 Activate/Transfer License

Displays the licensing window, allowing you to order, register or transfer the registration for your copy of SimpleIndex.

7.4.8.5 Download Updates

Opens the Update page on SimpleIndex.com in the default web browser.

7.4.8.6 Visit SimpleIndex.com

Opens the SimpleIndex.com website in the default web browser.

7.4.8.7 About SimpleIndex

Displays the version information for SimpleIndex.

7.5 Running jobs in SimpleSearch

With SimpleSearch, as well as SimpleIndex jobs configured for *Retrieval* mode (5.9.3.4), the index fields are turned into search fields, allowing you to type in criteria and view the matching documents.

SimpleSearch automatically uses partial matching to let you search for any part of the field value and pull up all the records that contain it. This allows you to quickly search for files without typing long strings of characters, finding groups of documents and finding files where spelling may be in question.

Use the *And/Or* selector to choose between matching all the values or any one of them. If a list is associated with that field you can select it using the drop-down.

Clicking the *Search* button retrieves the matching records and displays the first one on the screen. The index information for this document is displayed in the index fields but is not editable. You may use the navigation, zoom and rotation functions to view the documents, or click the *Open* button to open the current document in your default viewer, such as Imaging for Windows or Adobe Acrobat.

While viewing documents, you may click the *Clear* button at any time to clear the display and search fields, enable the *Search* button and allow you to perform another lookup.

The screenshot shows a web interface for SimpleSearch. At the top, there are two sections: 'Rotation' with left and right arrow buttons, and 'Navigation' with four arrow buttons (left, left, right, right) and labels 'Doc' and 'Page'. Below these is an 'OR' selector in a dropdown menu. The main area contains several search fields, each with a dropdown arrow: 'Doc Number' (value: 26), 'Date', 'Doc Type' (value: Invoice), 'Customer' (value: Dr. Darci Robson), 'Total', and 'Full Text'. At the bottom, there are two buttons: 'Clear' and 'Search'. Below the buttons is a 'Mouse Action' section with a radio button selected for 'Zoom In'.

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SimpleSearch can also be initiated from the *Command Line Interface* (8). Search keywords can be specified on the command line and the matching records displayed automatically.

8 Command Line Execution

Another powerful feature of SimpleIndex is that jobs can be executed from the command line and completed without user intervention. This allows programmers to implement fully automated document scanning in their applications with just a few lines of code. Non-programmers may also take advantage of this feature by designing program shortcuts with pre-defined index values and modes of operation. Using these methods, the work of the scanner operator can be reduced to a single mouse click.

8.1 Command Line Parameters

Usage 1: SimpleIndex [options]

Options:

/c:configfile	specify a configuration file to use
/m	specifies “manual” mode; disables automation and allows user to interact with prompts
/u:userid	uses the specified user ID for database logon and audit features
/p:password	uses the specified password for database logon
/d:#	enables the processing log with the logging detail level specified by # (0-5)
/#:value	where # is a field number (1-99), sets the index data for that field to value
/i:inputfolder	override the <i>Input</i> folder setting in the job config
/o:outputfolder	override the <i>Output</i> folder setting in the job config
/e	run in <i>SimpleSearch</i> mode
/t	exits the program after batch processing is finished

Usage 2: SimpleIndex configfile [field1value] [field2value] [field3value] ...

Using this form allows you to simply double-click a configuration file and have SimpleIndex execute it.

8.2 Implementing the command line interface

8.2.1 Opening SimpleIndex configurations from an icon

The command line interface allows saved SIC config files to be double-clicked, starting SimpleIndex and running the job automatically. If the batch is pre-indexed, the whole process will run unattended.

SimpleIndex job files can be opened from other applications, including the hotkeys on many scanners. By mapping hotkey events to SimpleIndex jobs, users can load documents, press the button for that document type, and have all the files scanned and indexed automatically.

By default, pre-indexed jobs run minimized when launched from an icon or command line. A dialog box is displayed when the batch has completed to let the user know it is finished. Use the “/q” option to suppress this dialog.

If you want to be able to open a config file by double-clicking it, but not have it automatically start processing, you can create a shortcut to that config that includes the “/m” switch. This will disable automatic processing and only open SimpleIndex with the specified config.

8.2.2 Integrating scanning with custom applications

Using the command line interface, all your program has to do is launch SimpleIndex with the appropriate configuration and images can automatically be linked to the data in your application. There are a few ways to do this:

- Use the *Insert* (5.9.3.2) or *Update* (5.9.3.3) database modes to update your database directly.
- Import the images and index information from the *Index Log* (5.8).
- Assume file structure based on the index data. If index field values are used to create a standard file naming convention, files can be opened from other applications by calculating the path on-the-fly.

8.3 Unattended Processing

SimpleIndex can be configured for unattended processing using several methods. To access scheduled processing options, open the configuration file you want to schedule and click the *Schedule Job* option from the *File* menu. The dialog shown here are displayed.

8.3.1 Run Jobs on a Timer

This option lets you keep SimpleIndex open on the desktop and have process the job on a regular interval. Indicate how often you would like the job to run using the *Timer*

Schedule Job

Server license is required to run as a Service or Scheduled Task. Use the Run button to use the job timer with the Desktop version.

Configure Service Options

Timer Interval
Every 5 Minutes

Run

Close

Stop when input folder is empty

Schedule with Task Scheduler

Start Date
Tuesday, March 15, 2011

Start Time
11:00:00 AM

User Account
simple\software

Password
XXXXXXXXXX

Schedule

Edit Tasks

Interval and click *Run* to begin automatic processing. SimpleIndex will continue to process the job on the selected interval until the user clicks the *Cancel* button. You can also select *Stop when input folder is empty* to end automatic processing as soon as all files have been processed.

8.3.2 Run Jobs with Windows Task Scheduler

You can use the Windows Task Scheduler to automatically launch SimpleIndex and run a job at a particular date in the future, or run it on an interval. Using the Task Scheduler does not require a Server license. The main drawback to this approach is that a user must be logged on to the computer for the job to run. Processing will stop if the user logs off or the computer is rebooted.

To configure a scheduled task, select a start date and time and click *Schedule*. You may optionally indicate a user account and password to run the task if the logged on user has insufficient rights.

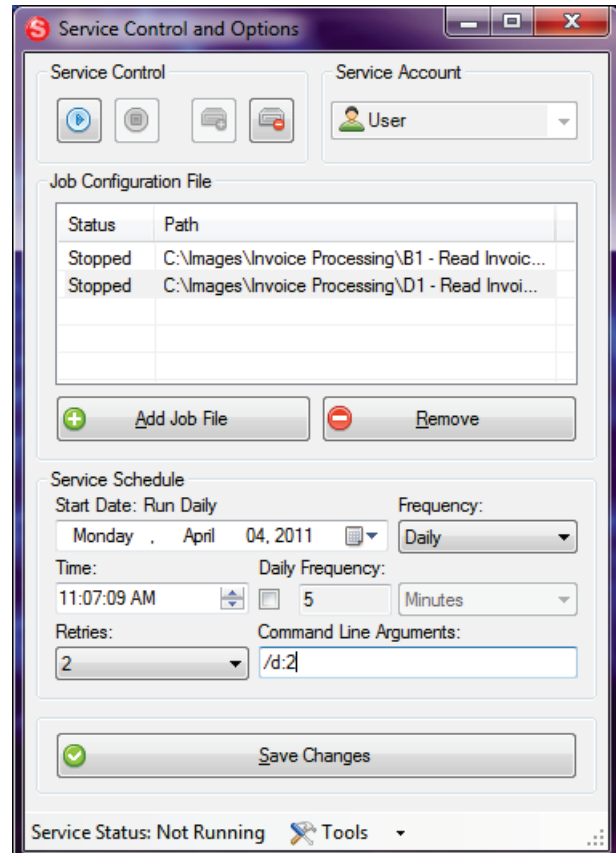
Click *Edit Tasks* to open the Windows Task Scheduler. From here you can enable or disable specific jobs, or configure detailed settings.

8.3.3 Run Jobs as a Windows Service

The Server license enables you run SimpleIndex as a Windows Service. This enables fully unattended processing for high-demand, server environments. Advantages to running as a Windows service include:

- User does not have to be logged on for process to run
- All dialog boxes are suppressed
- Errors are logged to the Windows Application Log
- Processing runs faster when application is hidden
- Services can be started and stopped remotely

Server processing requires Microsoft .NET 2.0 or above.



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The service options can be opened by clicking *Configure Service Options* from the *Schedule Job* screen, or it can be launched from the Start menu under SimpleIndex\Tools\Configure SimpleIndex Service.

8.3.3.1 Service Installation

The SimpleIndex service must first be installed before it can be configured. The service must run under a user account that has modify access rights to all folders and files used by the job. When all files are stored on the server, the *System* account is recommended. When files are stored on a network server you must select a user account that has sufficient network permissions to access these files. Under the *Service Account* drop-down, select *System* or *User* as needed then click *Install Service* under the *Service Control* options to create the service.

Once all service options have been configured you can use the *Start* and *Stop* buttons to control service execution. You may also edit detailed service parameters using the *Services* management tool under the Administrative Tools folder in your Start Menu or Control Panel.

8.3.3.2 Scheduling Jobs to Run

Once the service is installed you must add the job files that you want to run to the list using the *Add Job File* button. Only *Pre-Indexed* jobs can be run as a service--if the job is not configured properly for unattended processing you will receive a warning when you try to add it.

It is possible to run multiple jobs on different schedules. To configure the job schedule, select the job file from the list and the schedule for that job are displayed under *Service Schedule*.

For jobs that run once per day or less, select a *Start Date* and *Time*, and indicate the *Frequency* from the drop-down.

For jobs that run multiple times per day, check the box under *Daily Frequency* and indicate how often you would like the job to run.

Once the schedule has been set, click *Save Changes* to update the service controller. This will automatically restart the service.

8.3.3.3 Advanced Service Options

Retries - when an error occurs that prevents a service job from completing, the service controller will automatically end the job and restart it after this many timer cycles have completed. For example, if the job is set to run

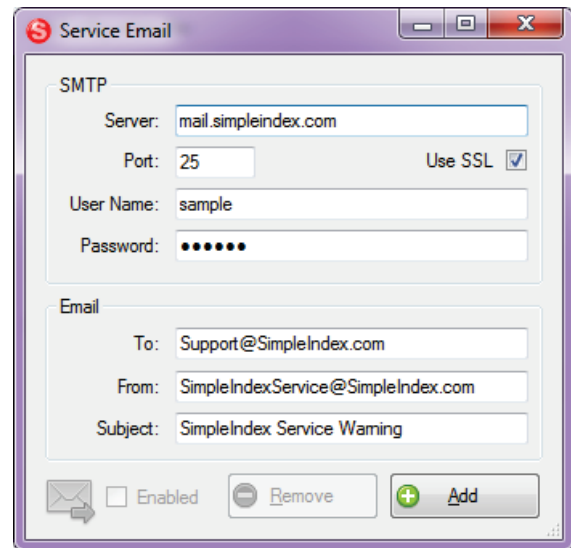
every 5 minutes, and the retries is set to 3, any job that has been executing for more than 15 minutes are restarted.

Command Line Arguments - the SimpleIndex service works by launching a new SimpleIndex process for each job on its scheduled interval.

Therefore it is possible to modify job parameters via the command line interface as part of the service configuration. The most common use for this is to enable the processing log with "/d". This will generate a detailed processing log that is very useful for diagnosing issues with unattended processes.

Email Configuration - the SimpleIndex service can email an administrator whenever there is an error with one of the service jobs. To configure email notifications, click the *Tools* box at the bottom of the service configuration and select *Email* to display the email settings.

The email notification system uses SMTP to send messages. Enter the SMTP server, user and password. Check *Use SSL* to encrypt the logon and prevent the password from being sent in plain text. Finally enter the *To*, *From* and *Subject* that will be used and click *Add* to save the settings, test and enable the email notifications.



The screenshot shows a window titled "Service Email" with a red 'S' icon in the top-left corner. The window is divided into two main sections: "SMTP" and "Email".

SMTP Section:

- Server: mail.simpleindex.com
- Port: 25
- Use SSL:
- User Name: sample
- Password: [masked with dots]

Email Section:

- To: Support@SimpleIndex.com
- From: SimpleIndexService@SimpleIndex.com
- Subject: SimpleIndex Service Warning

At the bottom of the window, there is a row of controls:

- An envelope icon with a checkmark.
- An "Enabled" checkbox, which is currently unchecked.
- A "Remove" button with a minus sign.
- An "Add" button with a plus sign.

9 Glossary

These terms are used without definition throughout this manual. Many refer to specific functions of SimpleIndex and hence have different meanings than when used elsewhere. Please familiarize yourself with these terms to help you better understand the manual.

Audit Field – An index field with a list of values where each must be present in the batch before it can be released (5.10.2.4).

Audit Log – Batch auditing ensures all required documents are scanned, or a justification has been entered for why a required document is not present. The audit log tracks these justifications.

Autofill – The process of using database lookups to automatically populate index fields based on a key value entered from the image (5.4.4).

Autonumber – Autonumbers (5.4.3.1.1) are numbered index fields that can be automatically incremented each time a new image, blank page or barcode is found. Autonumbers are useful for using document separators to create multi-page files (6.3), bates stamping (5.7) and other numbering tasks.

Barcode – Barcode recognition is also used by SimpleIndex to automate the population of indexes (5.5).

Batch – A batch is a group of documents that are processed together. All images in a batch must be indexed before they are saved to their final destination.

Batch Log – Contains summary information about each batch scanned, including the user id, start time, end time, total processing time, number of images processed and the batch ID (5.8).

Comma-Delimited Text File – A standard file format, similar to a spreadsheet, which lists data values, using commas to separate the columns of data (5.8). The following is an example:

```
"INVOICE","Doug Jacobsen","44","2003-10-23","\INVOICE\Doug Jacobsen-44-2003-10-23.TIF","1","2003-10-30@001508"  
"INVOICE","Pretell Real Estate","46","2003-10-26","\INVOICE\Pretell Real Estate-46-2003-10-26.TIF","1","2003-10-30@001508"  
"INVOICE","Dunn, Eric C.W.", "36", "2003-09-22", "\INVOICE\Dunn, Eric C.W.-36-2003-09-22.TIF", "1", "2003-10-30@001508"  
"INVOICE","Gordon Johnson", "37", "2003-09-26", "\INVOICE\Gordon Johnson-37-2003-09-26.TIF", "1", "2003-10-30@001508"  
"INVOICE","Brian K. Cook", "49", "2003-10-30", "\INVOICE\Brian K. Cook-49-2003-10-30.TIF", "1", "2003-10-30@001508"
```

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Command Line – Executing a program from a command line means that instead of double-clicking an icon, the program is launched using DOS command syntax. This allows you to launch SimpleIndex from other applications and pass information to it (8).

Insert Mode – When SimpleIndex is used to create new records in a database and link them to scanned images, this is referred to as *Insert* mode (5.9.3.2).

Update Mode – When SimpleIndex is used to retrieve existing records in a database and update the images and/or index information, this is referred to as *Update* mode (5.9.3.3).

Retrieval Mode – This refers to configurations designed for viewing documents linked to a database with SimpleSearch. No processing takes place in *Retrieval* mode (5.9.3.4).

Default Image Viewer – All Windows operating systems come with software to view TIFF and JPEG images. PDF images can be viewed with the free Acrobat Reader software. The Default Image Viewer refers to the software installed on the user's computer that is associated with these file types and used as a viewer when one of these files is double-clicked.

Document – Pages that go together form a document. SimpleIndex considers page with the same values for all *Folder* (5.4.3.5) and *Filename* (5.4.3.6) index fields a single document.

File – Refers to any file (images, PDF, MS Office, media clips, etc.)

Image – Refers specifically to image files (TIFF, JPEG, GIF, BMP, etc.). Can be a single page or multiple pages (TIFF Only).

Imaging for Windows – SimpleIndex is built around Global 360's Imaging for Windows OCX controls, which are used for image display, annotation, OCR and other imaging functions.

Imprint – This refers to the process of stamping text on an image. Imprinting normally refers to printers that physically print characters on a page as it is scanned. SimpleIndex provides an electronic substitute for imprinting by writing the characters to an already-scanned image (5.7).

Index – Refers to the values used to identify documents (5.4).

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Index Log – Contains the index information for a batch. The example comma-delimited text file is an index log. The Index Log contains the information the user enters to identify documents (5.8).

Job – A SimpleIndex Job refers to a set of configuration settings that determine how images are processed, indexed and exported. A job can also refer to the process of running a single batch with a particular set of configuration options, as in “running a job”.

Log Files – Refers to the following logs: Batch, Index and Audit. All are comma-delimited text files (5.8).

OCR – Stands for Optical Character Recognition and refers to the process of recognizing text from an image. In SimpleIndex, OCR is used to automate the population of index fields (5.6).

Record – Refers to a single set of index values in a database, which correspond to a single image file that may contain one or many pages.

Redact – This is the term for blacking out parts of a document that you don't want to be viewable. This is most commonly seen in classified documents that have been partially declassified for public viewing (4.6.4.4).

Release – When all images have been indexed, the images are copied to the *Output* folder (5.3.1.2) and the log files are generated (5.8). This process is referred to as releasing the batch.

TIFF – Stands for Tagged Image File Format. TIFF is an industry standard file format for black & white document images that yields small files that can be viewed on any computer. SimpleIndex uses TIFF images as the default file format.

10 Contacting Simple Software

SimpleIndex is a product of Simple Software. Simple Software is a wholly owned subsidiary of Meta Enterprises, LLC.

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