

Oracle® Distributed Document Capture

User's Guide

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Primary Author: Sarah Howland

Contributor: Ken Peterka, Rob Abbe, Dan Sievers, Jun Liang, Sara Johnson, Carl Diedrich, Vince Cook, and Richard Lindman

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Preface

This *User's Guide for Oracle Distributed Document Capture* describes how to use the browser-based application to scan, import, and index documents at remote locations.

Audience

This document is intended for users performing remote document scanning, importing, and indexing.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

The following topics are covered in this chapter:

- ["About Oracle Distributed Document Capture"](#) on page 1-1
- ["Starting Oracle Distributed Document Capture"](#) on page 1-1
- ["About Oracle Distributed Document Capture's Screens"](#) on page 1-2
- ["About Batches, Documents, and Pages"](#) on page 1-2

1.1 About Oracle Distributed Document Capture

Oracle Distributed Document Capture is an internet distributed document capture application that provides browser-based document scanning and indexing at remote locations. Its client component is automatically downloaded and installed as soon as you connect to the server. Use the client application for the following main tasks:

Main Task	Description
Scan and import batches	Scan batches of documents using settings saved by administrators in scan profiles. Depending on the profile, you may scan using a variety of methods, such as duplex or separator sheet scanning. You can also import images.
Review and index batches	Review and, depending on scan profile, index documents. To ensure standard input, index fields may use input masks/formatting, pick-lists, or external database lookups. Editing options allow you to move pages between documents, append and rotate pages, and create, copy, and paste documents.
Send batches	In a single step process, send one or more batches to the server, which receives and processes them, then typically commits (archives) the documents along with their index values into a content management system.

1.2 Starting Oracle Distributed Document Capture

The way you start the client application depends on how the Capture administrator configured settings. For example, an administrator may configure the application to launch from another web application by clicking a scan button or link. Follow these steps if provided with a web address.

1. Using Internet Explorer, enter the application's web address in the **Address** field.
(For example, enter `www.xyz.com\Capture\WebCapture.asp`.)

2. If prompted, enter a user name and password to log in.
Alternately, the administrator may have set you to be automatically logged in.
The [Client Screen](#) is displayed.

1.3 About Oracle Distributed Document Capture's Screens

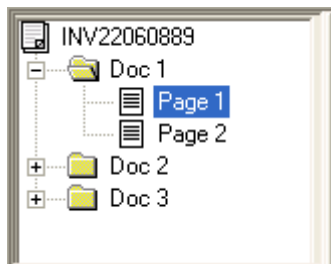
Oracle Distributed Document Capture contains two main screens:

- Use the [Client Screen](#) to perform batch actions such as scanning, importing, and sending batches.
- After scanning or importing, use the [Review/Index Screen](#) to perform actions on a selected batch of images, including indexing and editing documents.

1.4 About Batches, Documents, and Pages

As a user, you scan groups of pages in *batches*, using settings saved by an administrator in a *scan profile*. A batch is divided into one or more *documents*, and each document contains one or more *pages*. [Figure 1-1](#) displays a batch's tree view in the [Review/Index Screen](#). This batch contains three documents, each with one or more pages.

Figure 1-1 Tree View of Batch



How Documents Are Used

In addition to visually dividing pages, documents are integral to indexing. When indexing, index values you specify on one page apply to all pages in the document. After the batch is sent, all pages with the same index values are archived (committed) as a single document.

If indexing is not included in the scan profile, batches typically contain one document only. Most likely, these batches will be indexed and divided into documents later using another application such as Oracle Document Capture.

How Documents Are Created

Documents are created during scanning or importing based on profile settings. For example, if a profile is configured for separator sheet scanning, Oracle Distributed Document Capture creates a new document each time it encounters a separator sheet. Similarly, if a profile is configured for two-page, duplex scanning, Oracle Distributed Document Capture creates a new document after scanning each two-page document. See "[About Scanning Methods](#)" on page 2-1 for details.

In the [Review/Index Screen](#), you can make changes to documents. For example, you can move pages between documents as needed and create or remove documents. (A batch must always contain at least one document.)

About Sending Batches

Batches are temporarily stored while you review, edit, and index them. If needed, you can attach notes to batches, and assign them a priority from 0 to 10 or a status from those defined by an administrator. When you send batches, notes, status, and priority information are also sent for an administrator to view.

Batches whose scan profile includes indexing must be fully indexed before they can be sent. See "[About Indexing Documents](#)" on page 3-1 for more information about indexing. Once sent, batch results are displayed, and batches are removed from their temporary location. For more information, see "[Working With Batches](#)" on page 4-1.

About Scan Profiles and Settings

Scan profiles contain the main settings used to scan, import, and index batches. However, you can change default system settings that affect scanning, importing, and indexing in the [Settings Screen](#). For example, you can select duplex scanning, identify an automatic document feeder, or automatically straighten (deskew) images.

Scanning and Importing Documents

To scan or import documents in Oracle Distributed Document Capture, you select a scan profile and click the **Scan** or **Import** button. Before doing so, you may want to understand different methods of scanning (configured in scan profiles) and settings you can change that affect scanning.

This section covers the following topics:

- ["About Scanning Methods"](#) on page 2-1
- ["Selecting Scanning Settings"](#) on page 2-3
- ["Scanning Batches"](#) on page 2-4
- ["Importing Documents"](#) on page 2-4

2.1 About Scanning Methods

There are several key settings an administrator selects when creating a profile that control how you scan documents using the profile. Most likely, the profiles available to you include scanning instructions displayed in the **Profile Description** field when you select the scan profile in the [Client Screen](#).

Methods of scanning include:

- ["Scanning Without Indexing"](#) on page 2-1
- ["Scanning and Immediately Indexing"](#) on page 2-2
- ["Scanning Simplex or Duplex"](#) on page 2-2
- ["Scanning With Separator Sheets"](#) on page 2-2
- ["Prompted Scanning"](#) on page 2-2

2.1.1 Scanning Without Indexing

A scan profile may be configured to scan batches that do not need to be indexed at this point. When you scan this way:

- All pages are stored in one document in the batch. (Exception: If importing multiple files at once using this type of profile, the batch will contain multiple documents if you choose to create a document for each import file. See ["Importing Documents"](#) on page 2-4 for more information.)
- You can add *pages* to the document, but you cannot add *documents* with this type.
- No index fields are displayed in the [Review/Index Screen](#).

After scanning, you review and edit the batch, then send it. Typically, these scanned batches are indexed later at a central location.

2.1.2 Scanning and Immediately Indexing

A scan profile may be configured for you to scan a document and immediately review and index it. When you scan this way:

- All pages are scanned and stored in *one* document in the batch. (Exception: If importing multiple files at once using this type of profile, the batch will contain multiple documents if you choose to create a document for each import file. See ["Importing Documents"](#) on page 2-4 for more information.)
- The [Review/Index Screen](#) is displayed immediately after scanning or importing is complete.
- You can add pages to documents and add documents to the batch.

2.1.3 Scanning Simplex or Duplex

A scan profile may be configured to scan multiple single-sided or double-sided documents in a batch, which you index at your convenience. When you scan this way:

- Oracle Distributed Document Capture creates a batch that contains documents with one page (for single-sided documents) or two pages (for double-sided documents).
- You can add pages to documents and add documents to the batch.

Note: If you are scanning one-sided documents, your scanner should be set to simplex.

2.1.4 Scanning With Separator Sheets

A scan profile may be configured to scan multiple documents in a batch divided by separator sheets, which you index at your convenience. When you scan this way:

- You insert blank sheets between documents to indicate the start of a new document.
- During scanning, Oracle Distributed Document Capture looks for blank pages. Each time it detects a blank page, it creates a new document and deletes the blank separator sheet.
- A blank page is detected if its file size (in bytes) is below a threshold value. The administrator sets this value, but you can override it if needed in the [Settings Screen](#), as described in ["Selecting Scanning Settings"](#) on page 2-3. The recommended number is 1500, which means that Oracle Distributed Document Capture considers each page on which it finds fewer than 1500 bytes to be a blank page, and deletes it from the batch.

2.1.5 Prompted Scanning

A scan profile may be configured that prompts you to specify how documents are comprised. (After scanning, you can also define documents using the Create New Document option.) When you scan this way:

- The [Document Creation Options Screen](#) displays each time you scan, prompting you to specify how to create documents.

- Depending on the batch's contents, you can specify that it consists of simplex (one page) documents, duplex (two page) documents or a variable number of pages (documents divided by separator sheets).
- To scan documents divided by separator sheets, insert blank sheets between documents, choose the **Variable Number of Pages** option, and specify a value in the **Separator Sheets** field. Use the Separator Sheets field to indicate the difference between a blank separator page and a page with a small amount of text. A blank page is detected if its file size (in bytes) is below a threshold value. The recommended number is 1500, which means that Oracle Distributed Document Capture considers each page on which it finds fewer than 1500 bytes to be a blank page, and deletes it from the batch. If you encounter problems with this setting, increase or decrease the number of bytes as needed.

Note: If you select the **Variable Number of Pages** option but do not insert separator sheets, Oracle Distributed Document Capture creates one document in the batch.

2.2 Selecting Scanning Settings

Follow these steps to change scanning settings.

1. In the [Client Screen](#), click **Settings**.
The [Settings Screen](#) is displayed.
2. If your system is connected to more than one scanner, click **Select Scanner** and choose another scanner from those listed as available for use.
3. To display your scanner's standard settings screen before scanning each batch, check the **Display Scanner Dialog before scanning** field. This allows you to choose custom scanner settings for each batch.
4. If the selected scanner scans duplex (double-sided), check the **Duplex Scanning** field.
5. If your selected scanner has both a flatbed and an auto document feeder (ADF) and you want to use the ADF, select the **Use Auto Document Feeder** field. An auto feeder allows you to quickly scan pages in the feeder into a batch.
6. Select the **Prompt user to continue scanning into current batch** field to be prompted to add to the batch after refilling the feeder when it runs out of paper.
7. In the **Batch Path** field, change where batches are temporarily stored. This field is displayed only if you are allowed to change this location. Click the Browse button and select a new folder.
8. Select the **Auto Deskew** field to automatically straighten skewed images. This filter detects the skew angle and then rotates the image to correct it.
9. If pages are being scanned upside down or rotated, select a rotation option in the **Rotate Images** field to rotate all images.
10. To display the Review/Index screen immediately after a batch is scanned or imported, check **Auto Review/Index batch after scanning**. (This screen is always automatically displayed for profiles set for scanning and immediately indexing, as described in "[Scanning and Immediately Indexing](#)" on page 2-2.)
11. Click **Save**.

2.3 Scanning Batches

Follow these steps to scan a batch.

1. In the **Scan Profile** field on the [Client Screen](#), select a scan profile.
The scan profile contains the scanning settings to be used. If needed, ask the Capture administrator which scan profile to use. Instructions, if provided, are displayed in the **Profile Description** field.
2. Place the documents on the feeder tray of the scanner.
3. Click the **Scan** button. Oracle Distributed Document Capture begins scanning the documents.

Note: If you encounter problems while scanning, and the scanner will not scan, first check that the cables are properly connected.

When done, the batch is added to the Existing Batches table and selected.

Note: The batch may be immediately displayed in the Review/Index screen, if the **Auto Review/Index batch after scanning** field is checked in the [Settings Screen](#).

4. Click the **Review** button.
Tip: You can also double-click a batch in the Existing Batches table to review it.
5. In the [Review/Index Screen](#), review, edit, and index the batch. See "[Indexing and Editing Documents](#)" on page 3-1.

2.4 Importing Documents

You can import electronic image files stored in a variety of formats. Follow these steps to import batches.

1. On the [Client Screen](#), select a profile in the **Scan Profile** field and click **Import**.
The [Import Option Screen](#) is displayed.
2. Specify how you want documents created if importing multiple files. You can create one document containing all images or a document for each file.
3. In the File Import screen, select one or more files to import. To select multiple files, hold down the Ctrl or Shift key and click.
4. Click the **Open** button.
The selected files are imported and one or more documents are created, depending on the import option you selected.
5. In the [Review/Index Screen](#), review, edit, and index the batch. See "[Indexing and Editing Documents](#)" on page 3-1.

Indexing and Editing Documents

After scanning or importing a batch, you can review and make changes to it as often as you want before sending it to the server.

This section covers the following topics:

- ["About Indexing Documents"](#) on page 3-1
- ["About Indexing Methods"](#) on page 3-2
- ["Selecting Indexing Settings"](#) on page 3-3
- ["Indexing Documents"](#) on page 3-4
- ["Editing Documents and Pages"](#) on page 3-5
- ["Index Keyboard Shortcuts"](#) on page 3-8

3.1 About Indexing Documents

In Oracle Distributed Document Capture, you index a document by specifying values in its index fields. When people look for documents later, they will look for the information specified in these index fields. Specifying values in several fields for a document gives people different ways of searching for them. For example, you might enter a person's name in one index field, an identification number in another field, and the type of document in another field.

Important Points About Indexing

- If no index fields are displayed in the side pane of the [Review/Index Screen](#), the profile is scan only. No indexing is needed.
- You index on a document basis in Oracle Distributed Document Capture. Index values you specify for one page are automatically applied to all pages in the document.
- After batches are sent and received by the server, Oracle Distributed Document Capture merges all documents with the exact same index values into a single document.
- A document is considered indexed if it contains a value in one or more of its index fields and all required index fields are complete. (Required index fields display an asterisk before their names in the Review/Index screen.) If you do not enter values into all fields, users will not be able to find the document by those fields. For example, if you do not enter a social security number for a document, a user searching by social security number will not find that document.
- All documents in a batch must be indexed before the batch can be sent.

- Administrators configure how you specify an index field's value in the scan profile. For example, you may need to type an entry, select from a list of values, or perform a database lookup. See ["About Indexing Methods"](#) on page 3-2.
- Once you have mastered the basics of indexing, you may want to use the indexing keyboard commands to increase your speed. See ["Index Keyboard Shortcuts"](#) on page 3-8.

3.2 About Indexing Methods

Depending on how the administrator configures index fields in scan profiles you use, you may complete index fields in a variety of ways. For example, you might type an entry in a field called *Contact Last Name*, choose from a pick-list in a field called *Document Type*, and review an autopopulated field called *User*, in which your user name is automatically filled in.

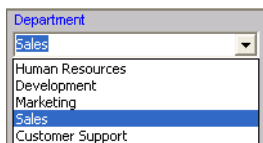
Special index field types include:

- ["Pick-list Index Fields"](#) on page 3-2
- ["Index Fields With Input Formats"](#) on page 3-3
- ["Index Fields With Input Masks"](#) on page 3-3
- ["Database Lookups"](#) on page 3-3

3.2.1 Pick-list Index Fields

A pick-list field provides a list of values from which to choose. Click the field's triangle to display and select from the pick-list, as shown in [Figure 3-1](#).

Figure 3-1 Pick-list Fields



Pick-list index fields can also be linked, where your selection in one pick-list field (the parent) determines the choices displayed in a linked pick-list field (the child). In [Figure 3-2](#), selecting *Sales* in the Department parent field displays a pick-list of sales-related choices in the Group child field.

Figure 3-2 Linked Pick-list Fields



3.2.2 Index Fields With Input Formats

An index field may use an input format to ensure that entries match a certain format. When you move to another index field, the application changes the field's value, if needed, to match the specified input format. For example, entries into a date field might be changed to a standard date format.

3.2.3 Index Fields With Input Masks

An index field may use an input mask, or filter, that controls what you can enter into the index field. For example, a mask might allow you to type numbers but not alphabetic characters into the field, or might limit your entry to four characters. If you type a character that does not conform to the mask, the system beeps and the application does not accept it. For example, an index field called *Invoice Number* might use an input mask that restricts entries to a 7-digit number.

3.2.4 Database Lookups

A database lookup provides another method of completing index fields. This option lets you search a database based on the current field in which the cursor is positioned. You enter characters to search for in the field and click the Database Lookup button. The application searches the database and displays values that match in a hit list. You select the value you want, and that value, along with other values from the database record, are inserted into the index fields. Database lookups can significantly speed up indexing and prevent errors.

For example, you might enter the first few characters of a customer's company name in an index field called Company and perform a database lookup. Index would search a database for records with company names starting with those characters and display a hit-list. After you choose the appropriate record from the hit-list, the application populates additional fields with information from the database record.

Depending on the scan profile, a hit-list may or may not be displayed when you select the Database Lookup button. The application might find one matching value only and automatically populate the remaining fields.

3.3 Selecting Indexing Settings

Follow these steps to change default settings that affect how batches are indexed.

1. In the Client screen, click **Settings**.
The [Settings Screen](#) is displayed.
2. In the **Font Size for Index Fields** field, select the size at which you want characters in index fields displayed.
3. To display the Review/Index screen immediately after a batch is scanned or imported, check **Auto Review/Index batch after scanning**. (This screen is always automatically displayed for profiles set for scanning and immediately indexing.)
4. Click **Save**.

3.4 Indexing Documents

Follow these steps to index documents.

1. In the [Client Screen](#), select a previously scanned or imported batch and click **Review**.

The batch is displayed in the [Review/Index Screen](#), with the first page in the first document selected in the tree view and displayed in the page view area. An asterisk is displayed before the names of required fields.

2. Specify values in the index fields.

See "[About Indexing Methods](#)" on page 3-2 for more information.

Press the Tab or Enter key to move to the next field. Press Alt-Tab to return to a previous field.

3. Use the buttons on the toolbar to help you index documents.

For example, change the page's magnification by zooming in or out. See "[Editing Documents and Pages](#)" on page 3-5 for more information.

4. Click the **Next Page** button on the toolbar (Ctrl+Alt+N).

The next page in the document is selected and displayed. Notice that the same index values you entered for the first page are displayed for this second page. You need to enter index values only once for a document, and they are applied to all its pages.

5. If the batch contains multiple documents, click the **Next Document** button.

If present, the second document opens and its first page is displayed. Notice how the document does not yet contain index values. It is a new document that needs different index values. Only documents with the exact same index values are merged into a single document.

Tip: Positioning the cursor on a page's name in the Documents area displays its index values on a single line. This lets you quickly view index values for documents in a batch without selecting one of their pages.

6. Click the **Close** or **Send** button.
 - Clicking **Close** saves your changes and displays the Client screen. You can close a batch even if you did not fully index documents. The **Indexed** column in the Existing Batches table indicates whether the batch is fully indexed.
 - Clicking **Send** sends the batch to the server, if fully indexed. (If it is not indexed, a message displays.)

3.4.1 Completing Database Lookups

Follow these steps to complete a database lookup.

1. In the [Review/Index Screen](#), click the cursor in an index field for which a database lookup has been configured.

The **Database Lookup** button is active when you can perform a database search for an index field.

2. Enter the first few characters to match. (Numeric fields often require exact values.)
For example, type *New* in an index field called *Company* to search for records whose *Company* field name starts with *New*. Leaving the field blank will match all records.
3. Click the **Database Lookup** button.
The [Database Lookup Hit List Screen](#) containing matching records may be displayed, listing possible matching records. A hit-list is displayed if multiple records were found or if the administrator chose to display it.
4. If a hit-list is displayed, select a matching record.
Values from the database record populate index fields.

3.5 Editing Documents and Pages

After scanning or importing a batch, follow these steps to view and edit its documents.

1. In the [Client Screen](#), double-click a batch in the Existing Batches table. The first page of the batch is displayed in the [Review/Index Screen](#).
2. Select from the following editing options:
 - ["Zooming"](#) on page 3-5
 - ["Resizing the Batch, Index and Page View Areas"](#) on page 3-6
 - ["Appending Pages"](#) on page 3-6
 - ["Inserting Pages"](#) on page 3-6
 - ["Replacing Pages"](#) on page 3-6
 - ["Rotating and Flipping Pages"](#) on page 3-7
 - ["Creating and Removing Documents"](#) on page 3-7
 - ["Copying and Pasting Documents"](#) on page 3-7
 - ["Moving Pages Within and Between Documents"](#) on page 3-8
 - ["Deleting Pages and Documents"](#) on page 3-8
 - ["Printing Scanned Pages"](#) on page 3-8

3.5.1 Zooming

Use the **Zoom In**, **Zoom Out**, and **Fit to Window** buttons in the [Review/Index Screen](#) to enlarge or reduce the image in the viewer to ensure good image quality. These settings are not saved with the batch. When you open a batch, its images are always displayed in the **Fit to Window** size.

- Click **Zoom In** to enlarge the image. Click **Zoom Out** to reduce the image.
- Another way to zoom is to *click and drag a rectangular area* on the image using the left mouse button.
- At any point, click the **Fit to Window** button to display the entire image in the viewer.

3.5.2 Resizing the Batch, Index and Page View Areas

You can resize the three areas in the [Review/Index Screen](#). For example, if the index fields contain long entries, decrease the Page View area to allow more room for the index fields. Note that after resizing areas, the new dimensions are saved and used when reviewing batches in the future.

1. Position the cursor on the line between two areas until it turns to a two-headed arrow. Drag it to a new position and release.

3.5.3 Appending Pages

Follow these steps to append pages (add them to the end of a batch). Another option is to insert them between other pages in the batch, as described in "[Inserting Pages](#)" on page 3-6.

1. If scanning, place the pages in the scanner.
2. In the [Review/Index Screen](#), choose scan or import mode by clicking the **Toggle Scan Mode** or **Toggle Import Mode** toolbar button.
3. Click the **Append Page** button.

The [Append Pages Screen](#) is displayed, prompting you to choose one of the following:

- Add pages to the end of the selected document or create a new document?
 - If creating a new document, scan one page or all pages in the feeder, or import files into one document or separate documents?
4. Specify the pages to scan or import and where to append them.
One or more pages are added as specified.

3.5.4 Inserting Pages

Follow these steps to insert new pages between other pages in a batch. Another option is to append them, as described in "[Appending Pages](#)" on page 3-6.

1. If scanning, place the pages in the scanner.
2. In the [Review/Index Screen](#), choose scan or import mode by clicking the **Toggle Scan Mode** or **Toggle Import Mode** toolbar button.
3. Click the **Replace Page** button. Click **Yes** to confirm deleting the selected page and replacing it with the page you are scanning or importing.

3.5.5 Replacing Pages

Follow these steps to replace a page. For example, you might do this if a problem occurred and only half of the page was scanned.

1. If scanning, place the pages in the scanner.
2. In the [Review/Index Screen](#), choose scan or import mode by clicking the **Toggle Scan Mode** or **Toggle Import Mode** toolbar button.
3. Click the **Replace Page** button. Click **Yes** to confirm deleting the selected page and replacing it with the page you are scanning or importing.

3.5.6 Rotating and Flipping Pages

To rotate a selected image within the viewer, click one of the Rotate buttons on the [Review/Index Screen](#). When an image is rotated, it is saved that way within the batch.

- Click **Rotate Left** to rotate the image 90 degrees counterclockwise.
- Click **Rotate Right** to rotate the image 90 degrees clockwise.
- Click **Flip** to rotate the image 180 degrees.

If you want all images rotated (landscape mode, for example), contact your Capture administrator about having the scan profile changed. To set all images to be rotated, adjust the Rotate Images field in the [Settings Screen](#).

3.5.7 Creating and Removing Documents

Follow these steps to add or remove documents in the [Review/Index Screen](#). (Removing a document does not remove its pages.) For example, suppose you realize that certain pages belong to another customer and need to be in a separate document.

Creating a Document

Follow these steps to create a new document.

1. Select the page at which you want to create a new document.
2. Click the **Create New Document** button.

A new document is added below the current document and all pages below it (until the next document) are placed within it.

Removing a Document

Follow these steps to remove a document. Removing a document deletes the document's folder and appends its pages to the previous document. (If you remove the first document, its pages are appended to the next document.)

1. Select the document you want to remove.
2. Click the **Remove Document** button. Confirm removing the document.

3.5.8 Copying and Pasting Documents

Follow these steps to copy and paste documents. This allows you to duplicate a set of pages in order to apply different index values and file the pages as a separate document.

1. In the [Review/Index Screen](#), right-click a document in the Documents tree view, and choose **Copy Document**. You must select a document rather than a page.
2. Right-click the document before or after which you want to paste the copied document, choose **Paste Document**, then choose **Before Selected Document** or **After Selected Document**.

3.5.9 Moving Pages Within and Between Documents

Follow these steps to move a page within a document or to another document.

1. In the [Review/Index Screen](#), click and drag a page on top of the page before which you want to place it. As you drag, a Page icon is displayed.
2. Release when you have highlighted the page where you want to move it. It is placed BEFORE the highlighted page and pages are renumbered if needed. If you drag the only remaining page in a document to another document, the document is automatically removed.

3.5.10 Deleting Pages and Documents

Follow these steps to delete a page or document. Note that the Delete button deletes either a page or a document, depending on which item is selected.

1. In the document tree of the [Review/Index Screen](#), click the page or document you want to delete.
2. Click the **Delete** button. Confirm deleting the page or document.






3.5.11 Printing Scanned Pages




Follow these steps to print an image.

1. In the document tree of the [Review/Index Screen](#), select the page you want to print.
2. Click the **Print Page** button. The page is printed using default printer settings.

3.6 Index Keyboard Shortcuts

There are many keyboard shortcuts available for use while editing in Oracle Distributed Document Capture. Keyboard shortcuts can improve the accessibility for users. Additionally, not having to move their hands from the keyboard to the mouse and back is a faster, easier method of editing.

Button	Shortcut	Button Name	Description
	Ctrl + Alt + A	Select All Batches	In the Client Screen , selects all batches.
	Ctrl + Alt + U	Previous Document	In the Review/Index Screen , selects the previous document and displays its first page.
	Ctrl + Alt + P	Previous Page	In the Review/Index Screen , selects and displays the previous page, opening the previous document if needed.
	Ctrl + Alt + N	Next Page	In the Review/Index Screen , selects and displays the next page, opening the next document if needed.
	Ctrl + Alt + D	Next Document	In the Review/Index Screen , selects the next document and displays its first page.
	Ctrl + Alt + C	Create New Document	In the Review/Index Screen , creates a new document, using the current page and all pages below it until the next document.

Button	Shortcut	Button Name	Description
	Ctrl + Alt + R	Remove Document	In the Review/Index Screen , removes the selected document and appends its pages to the end of the previous document. (If the selected document is the first document in the batch, the pages are added to the next document.)
	Ctrl + Alt + E	Delete	In the Review/Index Screen , deletes the document or page, whichever is selected.
	Ctrl + Alt + L	Database Lookup	In the Review/Index Screen , performs a database search for the selected index field, searching for specified characters.

Working With Batches

After batches of documents are scanned or imported, they are ready for review, indexing (if specified), and sending. Use the [Client Screen](#) to perform actions on batches.

This section covers the following topics:

- ["Sending Batches"](#) on page 4-1
- ["Changing Batch Priority and Status"](#) on page 4-2
- ["Adding, Editing and Deleting Batch Notes"](#) on page 4-2
- ["Deleting Batches"](#) on page 4-3

4.1 Sending Batches

Sending batches transfers them to a central server and removes them. Once you begin sending batches, you cannot cancel, so review, edit, and index them first. Note the following:

- You can send multiple batches at a time.
- To send a batch, all required index fields for all documents must be completed. To be indexed, at least one field must contain data, and all required fields must contain values.
- Any priority, status, or note information set when you send a batch is sent along with the batch to the server, where an administrator can see it.

Send completed batches using either of the following procedures.

Sending the Current Batch From the [Review/Index Screen](#)

1. Click the **Send** button on the toolbar.

The [Client Screen](#) is displayed.

2. Confirm sending the batch.

The application begins uploading the selected batch to the server. While the file is being sent, the cursor changes to an hourglass and the progress bar moves to the end.

3. View batch send results.

After the batch upload is complete, the [Batch Send Results Screen](#) is displayed. Its table lists all batches selected for sending. If needed for troubleshooting purposes, click **Copy to Clipboard** to copy the selected batch results to the clipboard for pasting into another application.

Sending Selected Batches From the [Client Screen](#)

1. Select the batches to be sent.
If needed, click the **Scan Profile** field to select a new profile. To select multiple batches, hold down the Ctrl or Shift key and click.
2. Click the **Send** button. Confirm sending the batches.
The application begins uploading the selected batches to the server. While one or more files are being sent, the cursor changes to an hourglass and the blue progress bar at the bottom of the screen moves to the end.
3. View batch send results.
After the batch upload is complete, the [Batch Send Results Screen](#) is displayed. Its table lists all batches selected for sending. Select a batch to view its details in the **Description** field. If needed for troubleshooting purposes, click **Copy to Clipboard** to copy the selected batch results to the clipboard for pasting into another application.

4.2 Changing Batch Priority and Status

Follow these steps to change a batch's priority or status. Priority and status are sent along with the batch to the server, where an administrator can see them.

- Batches may have a default priority assigned to them. The priority is a number from 0 to 10, with 10 indicating the highest priority.
 - Batches may have a default status assigned to them. (The administrator determines the statuses you can set.)
1. In the [Client Screen](#), select a batch in the Existing Batches table.
 2. Click the **Batch Info** button.
 3. In the [Batch Information Screen](#), specify a new status or priority

4.3 Adding, Editing and Deleting Batch Notes

Follow these steps to add, edit, or delete a batch note. Notes you enter are sent to the server when the batch is sent.

1. In the [Client Screen](#), select a batch in the Existing Batches table.
2. Click the **Batch Info** button.
3. In the [Batch Information Screen](#), enter, edit, or remove a note in the **Batch Notes** field.

You do not need to press Enter at the end of each line, since the text automatically wraps to the next line. The note can be as long as you want.

When a batch has a note attached to it, a push pin is displayed in the Note column of the Existing Batches table.

4.4 Deleting Batches

Follow these steps to delete a batch that is no longer needed. Deleting a batch permanently removes the batch and all of its related documents and pages.

1. In the [Client Screen](#), select one or more batches to delete.

Select multiple batches by holding down the Ctrl or Shift key while clicking batch names. To select all batches, press Ctrl+Alt+A.

2. Click the **Delete** button. Click **Yes** to confirm the deletion.

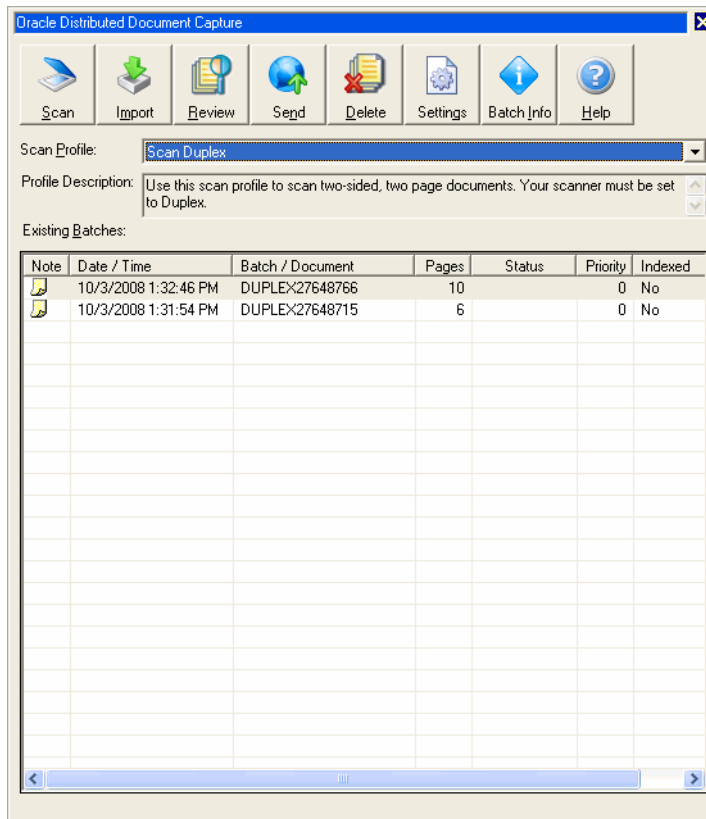
User Interface

Oracle Distributed Document Capture contains a number of user interface screens, including:

- "Client Screen" on page A-2
- "Review/Index Screen" on page A-3
- "Settings Screen" on page A-6
- "Document Creation Options Screen" on page A-7
- "Import Option Screen" on page A-8
- "Batch Information Screen" on page A-8
- "Append Pages Screen" on page A-9
- "Batch Send Results Screen" on page A-10
- "Database Lookup Hit List Screen" on page A-11

A.1 Client Screen

Use the Client screen to perform batch actions such as scanning or sending batches. Display this screen by starting the Oracle Distributed Document Capture application.



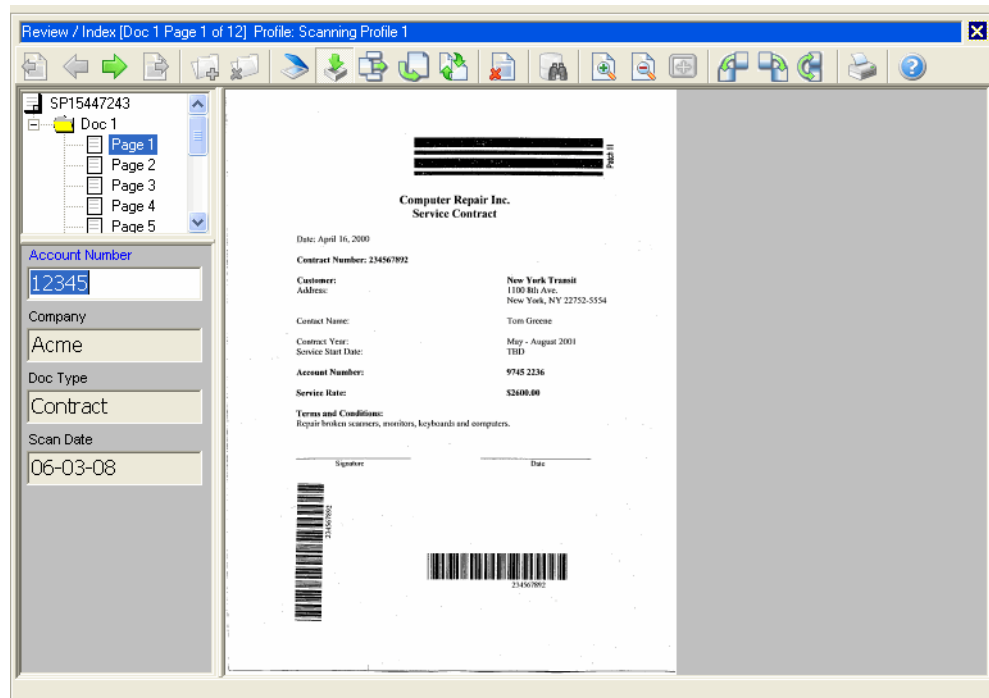
Element	Description
Scan	Begin scanning papers using the profile selected in the Scan Profile field.
Import	Begin importing image files using the profile selected in the Scan Profile field.
Review	Display and edit the selected batch in the Review/Index screen.
Send	Send the selected batches to the server for processing. Hold down the Ctrl or Shift key to select multiple batches.
Delete	Delete the selected batches. Hold down the Ctrl or Shift key to select multiple batches.
Settings	Change application settings, including scanner and image processing settings.
Batch Info	Display information about the selected batch and to add batch notes, or change the status or priority of the batch.
Scan Profile	Select a profile whose settings you want to use when scanning or importing batches of documents. A profile is a set of scanning options configured by the administrator. An administrator can make a profile inactive, in which case (<i>Inactive</i>) is displayed after the profile name. You can review, index, and send batches whose profile is inactive, but you cannot create new batches using an inactive profile.

Element	Description
Profile Description	If shown, displays instructions for using the selected scan profile.
Existing Batches	<p>This table lists batches scanned or imported using the selected profile, including:</p> <ul style="list-style-type: none"> ■ Note: A push pin is displayed in the Note column if the batch has an attached note. ■ Date/Time: Indicates the date and time at which the batch was created. ■ Batch/Document: Each batch's name uses a batch prefix followed by a series of numbers. ■ Pages: Number of images in the batch. ■ Status: Batches may be assigned a status. ■ Priority: Batches may be assigned a number from 0 to 10 (where 10 is highest). ■ Indexed: Indicates if the batch has been indexed. <p>Sort the batch list by clicking a column heading. For example, click the Priority heading to display batches in ascending order by their priority. Click the heading again to sort the list in the opposite direction.</p>

A.2 Review/Index Screen

Use this screen to perform actions on a selected batch of images.












Display this screen by selecting a batch in the Client screen and clicking **Review**. This screen may be automatically displayed when scanning or importing batches.














Element	Description
Document Tree	Displays a tree view of the batch, its documents and each document's pages.
Index Fields	If the profile includes indexing, this area displays fields to complete. See " Indexing and Editing Documents " on page 3-1.
Page View	This area displays the page selected in the Documents tree. Use the toolbar options to make changes to this selected page.
Toolbar	Use toolbar options to make changes to the selected page, document, or batch, as described in the next section.

Review/Index Screen Toolbar

The Review/Index screen's toolbar contains the following options:

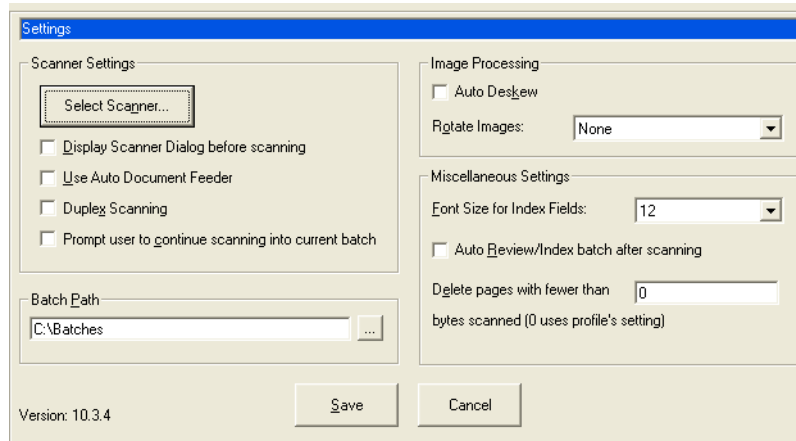
Button	Button Name	Description
	Close	Close the batch without sending it and display the Client screen.
	Send	Close the batch, display the Client screen, and confirm sending the batch. Note that if index fields are included, the batch must be fully indexed before it can be sent.
	Previous Document	Selects the previous document and displays its first page.
	Previous Page	Selects and displays the previous page, opening the previous document if needed.
	Next Page	Selects and displays the next page, opening the next document if needed.
	Next Document	Selects the next document and displays its first page.
	Create New Document	Creates a new document, using the current page and all pages below it until the next document.
	Remove Document	Removes the selected document, adding its page (if any) to the end of the previous document. (If the selected document is the first document in the batch, the pages are added to the next document.) This button is available when a document is selected. Note that index values for documents you remove are not retained.
	Toggle Scan Mode	Changes the mode from import to scan. This button displays depressed when selected. The selected mode determines whether images are scanned or imported when appending, replacing, or inserting pages.
	Toggle Import Mode	Changes the mode from scan to import. This button displays depressed when selected. The selected mode determines whether images are scanned or imported when appending, replacing, or inserting pages.
	Insert Page	Displays options for scanning or importing new pages into the batch. Pages are inserted before the selected page. If scanning, prompts you to scan one page or all pages in the feeder. If importing, prompts you to specify images to import.

Button	Button Name	Description
	Append Page	Displays options for scanning or importing pages to add to the batch. If scanning, prompts you to scan one page or all pages in the feeder. If importing, prompts you to specify images to import. Also asks if you want to add pages to the end of the selected document or create a new document.
	Replace Page	Deletes the selected page and replaces it with the page you scan or import.
	Delete	Deletes either a page or a document, whichever is selected.
	Database Lookup	Performs a database search for the current index field. This button is available when a database lookup is configured for the selected index field. Enter the first few matching characters and click the button. If a hit list of possible matching values is displayed, select a value.
	Zoom In	Increases the magnification of the selected page view. Click repeatedly to further zoom in.
	Zoom Out	Decreases the magnification of the selected page view. Click repeatedly to further zoom out.
	Fit to Window	Changes the page display so that the entire page fits in the window.
	Rotate Left	Rotates the selected page to the left 90 degrees. The page is saved as last rotated.
	Rotate Right	Rotates the selected page to the right 90 degrees. The page is saved as last rotated.
	Flip Image	Rotates the selected page upside down 180 degrees. The page is saved as last rotated.
	Print Page	Prints the selected page to the selected printer.

A.3 Settings Screen

Use the Settings screen to change Oracle Distributed Document Capture settings on your system.

Display this screen by clicking **Settings** on the Client screen.



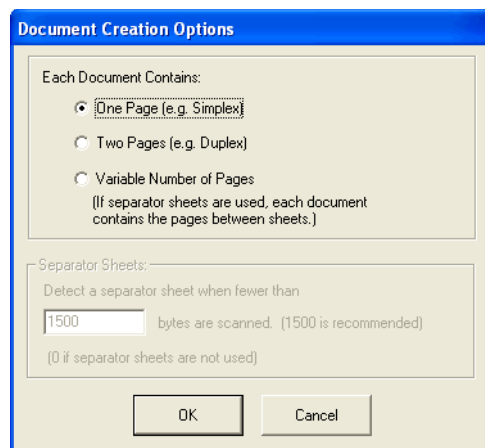
Element	Description
Select Scanner	Select a scanner from those available to you. This button is active if your computer is connected to more than one scanner.
Display Scanner Dialog before scanning	If selected, your scanner's standard settings screen is displayed each time you scan. This is useful for choosing custom settings for each batch.
Use Auto Document Feeder	Select this field if your selected scanner has both a flatbed and an auto document feeder (ADF) and you want to use the ADF. An auto feeder allows you to quickly scan pages from the feeder into a batch.
Duplex Scanning	Select this field if your scanner supports duplex scanning.
Prompt user to continue scanning into current batch	Select this field to be prompted to add to a batch immediately after scanning.
Batch Path	If displayed, this field lets you change where batches are temporarily stored. (Batches are removed when you send them to the server.) If you are not allowed to change this location, this field is not displayed. To change the batch path, you click the ... (Browse) button and select a new folder.
Auto Deskew	Select this field to automatically straighten skewed images. When documents are fed into a scanner, fax machine, or copier, they can become skewed. This filter detects the skew angle and then rotates the image to correct it.
Rotate Images	If pages are being scanned upside down or rotated, select this field to rotate all images. Note that you can rotate a single image by clicking the Rotate button in the Review/Edit screen. Rotated images are saved that way in the batch.
Font Size for Index Fields	Select the font size in which to display text characters in index fields displayed.

Element	Description
Auto Review/Index batch after scanning	Select this field to automatically display the Review/Index screen after scanning or importing a batch. (Depending on profile settings, the Review/Index screen may already automatically display.)
Delete pages with fewer than ___ bytes scanned	This field allows you to automatically delete blank pages. (This may already have been set in the profile, but you can use this field to override the administrator's setting.) Enter the number of bytes at which you want blank pages detected and deleted. The recommended number is 1500, which means that the application considers each page on which fewer than 1500 bytes are found to be a blank page and deletes it from the batch.
Save	Save the settings you selected.
Cancel	Exit the dialog box without saving changes.

A.4 Document Creation Options Screen

Use this screen to specify how to create documents. You can create documents with one page, two pages, or a variable number of pages.

This screen may automatically display each time you scan, depending on profile settings.



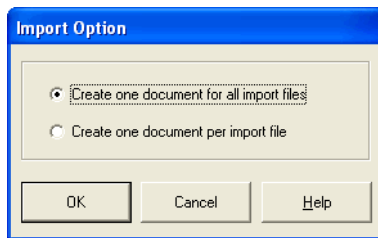
Elements	Description
Each Document Contains	Specify how you want documents created in the batch. <ul style="list-style-type: none"> ■ One Page: Select this option if the batch contains single page (simplex) documents only. The application will create documents with one page each. ■ Two Pages: Select this option if the batch contains two page or double-sided (duplex) documents only. The application will create documents with two pages each. ■ Variable Number of Pages: Select this option if the batch contains documents with a variable number of pages and separator sheets were placed between documents. Specify how to detect a separator sheet in the Separator Sheets field.

Elements	Description
Separator Sheets	Use this field to indicate the difference between a blank separator page and a page with a small amount of text. (Even when a blank white sheet is scanned, the scanner detects small dots on the page. Typically these dots are from dust and lint.) If you enter 1500 in this field, the application is typically able to distinguish separator pages from other pages. Increase or decrease the number of bytes as needed.

A.5 Import Option Screen

Use this screen to specify how you want documents created from imported image files.

Display this screen by clicking the **Import** button on the [Client Screen](#).

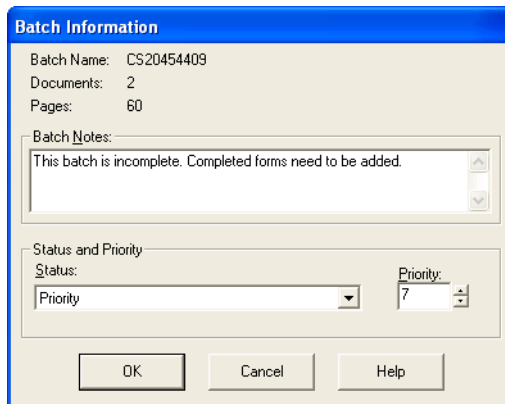


Select the first option to create one document that includes all selected files. Select the second option to create a separate document for each selected image file. Note that images in multiple page TIFF files are always placed in the same document.

A.6 Batch Information Screen

This screen displays information about the selected batch, and allows you to enter or edit the batch's note, status, and priority.

Display this screen by clicking the **Batch Info** button in the [Client Screen](#).



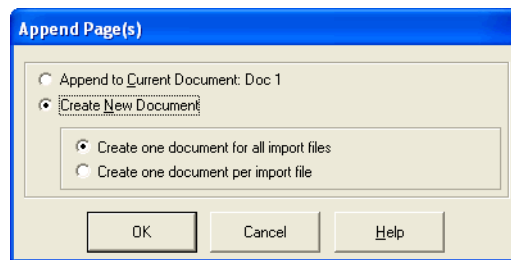
Elements	Description
Batch Name	Name assigned to the selected batch.
Documents	Number of documents contained in the batch.
Pages	Total number of pages (images) in the batch.

Elements	Description
Batch Notes	Enter, edit, or delete a note for the batch. Notes are sent with batches.
Status	Select a status to assign to the batch or select <None> to remove a status. Status information is sent with a batch.
Priority	Enter or select a number between 0 and 10 to assign to the batch, where 10 is the highest priority.

A.7 Append Pages Screen

Use this screen to specify how you want to append new pages.

Access this screen by clicking the **Append Page** button on the toolbar of the [Review/Index Screen](#).

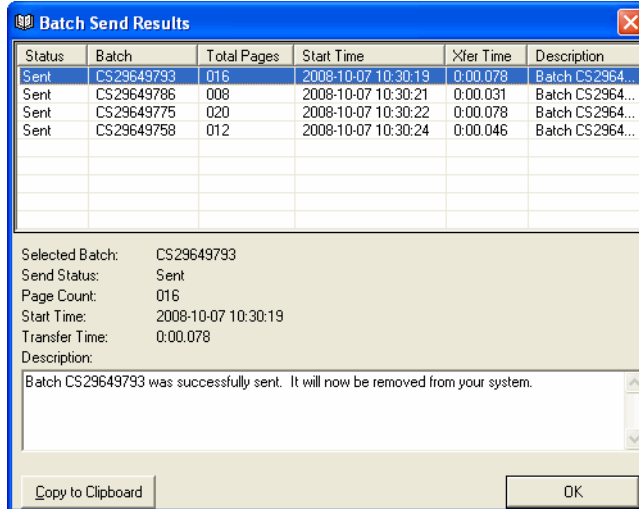


Elements	Description
Append to Current Document	Add the scanned pages to the end of the selected document.
Create New Document	Add the scanned pages to a new document placed last in the batch.
Create one document for all import files/per import file	Specify whether to create one document for all imported files or for each imported file. (These options are displayed when the Toggle Import Mode button is selected in the toolbar.)
Scan One Page, Scan All Pages	Specify whether to scan and append one page only or all pages in the scanner. (These options are displayed when the Toggle Scan Mode button is selected in the toolbar.)

A.8 Batch Send Results Screen

Use this screen to view results after sending one or more batches to the server.

This screen is displayed after you click the **Send** button in either the [Client Screen](#) or the [Review/Index Screen](#).

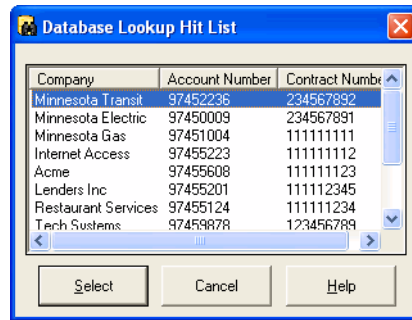


Elements	Description
Results table	Lists information about batches just sent. Results for the selected batch are displayed below the table. Columns include: <ul style="list-style-type: none"> ■ Status: Lists one of the following statuses: Sent, Pre-Send Error, Send Error, or Post-Send Error. ■ Batch: Name assigned to the batch. ■ Total Pages: Pages sent in the batch. ■ Start Time: Transfer date and start time. ■ Xfer Time: Transfer time in seconds. ■ Description: Displays a batch's send results.
Copy to Clipboard	Saves all results information for the selected batch to the clipboard, if needed for troubleshooting.

A.9 Database Lookup Hit List Screen

Use this screen to select a matching database record for populating index fields.

This screen is displayed after you select the **Database Lookup** button on the toolbar in the [Review/Index Screen](#). This button is active only when a database lookup has been configured for the selected index field. Typically, you enter characters to match before clicking the button, such as a company's first few letters in a company name field. (Numeric fields typically require you to enter exact values before performing a database lookup.)



Elements	Description
Table	The table displays one or more rows of database values to help you select the correct record.
Select	Click to choose the selected database record and populate index fields using the record's values.
Cancel	Cancel the database lookup.

Copyright and Patent Notices

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U.S. Patent Nos. 6,094,505, 5,768,416, 5,625,465, 5,369,508 and 5,258,855.



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